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ABSTRACT

This document is a comprehensive guide to electronic packaging with electronic data exchange (EDE) of Title IV student financial aid application data to and from the U.S. Department of Education. An overview chapter introduces the concepts of electronic packaging and implementation using EDExpress for Windows. Chapter 2 explains the query utility function of electronic packaging which allows use of a variety of selection criteria. Chapter 3 explains how to define components of an institution's academic year, determine global packaging system settings, and establish codes for satisfactory academic progress. Chapter 4 is on using the system to set up budgets in EDExpress for Windows. Chapter 5 discusses document tracking and Chapter 6 explains importation of Institutional Student Individual Records to create packaging records. Chapter 7 explains the fund maintenance function, which allows the addition of as many aid sources as needed for packaging students. Chapters 8 and 9 explain the EDExpress functions of award methodology, award adjustments, and award letters. Chapter 10 explains the hands-on workshop examples. Appendices illustrate file formats, offer worksheets, and provide sample print reports. (DB)

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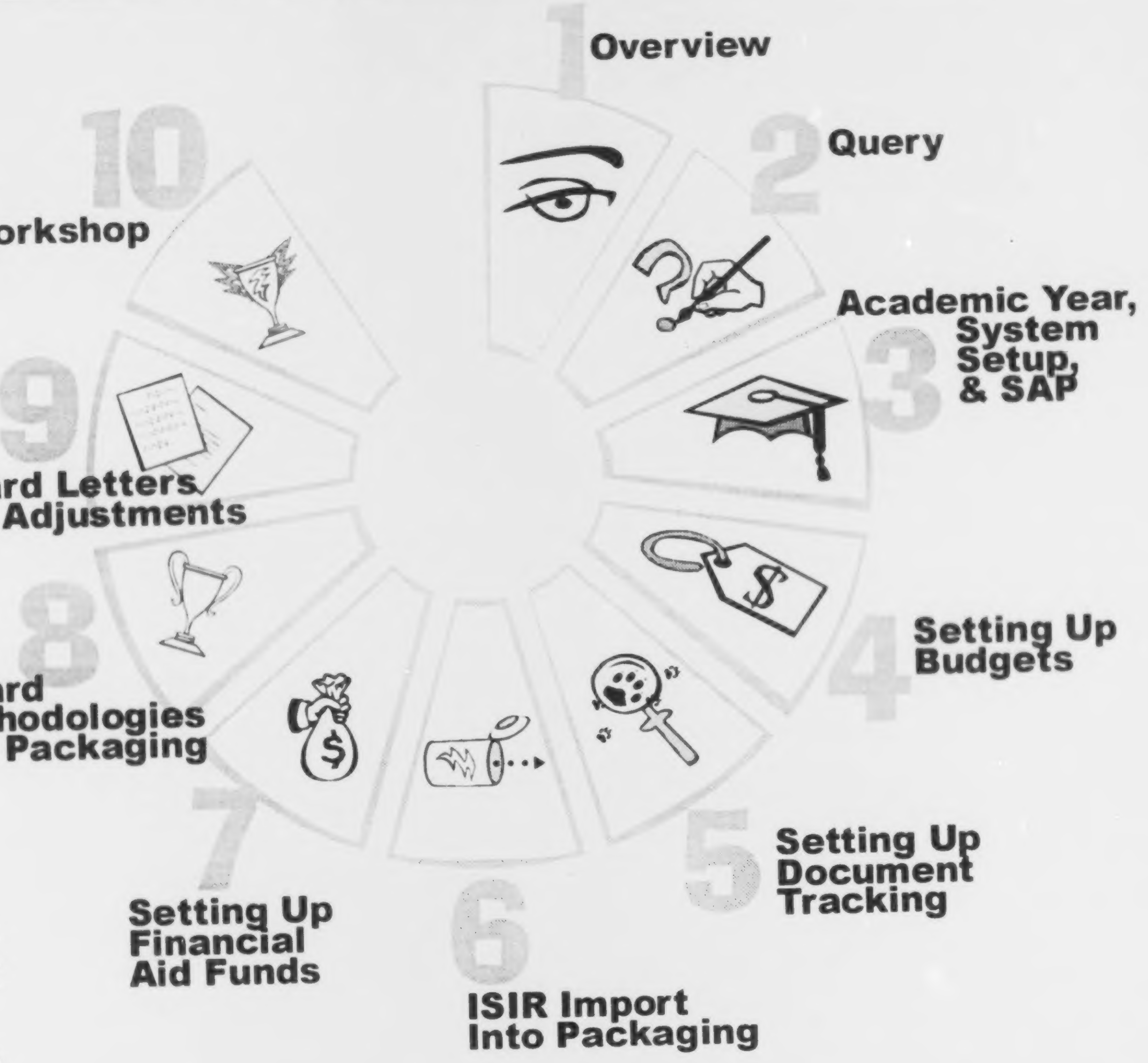
ED 428 602

1999-2000 EDExpress Packaging Training



1 Overview

2 Query

3 Academic Year, System Setup, & SAP

4 Setting Up Budgets

5 Setting Up Document Tracking

6 ISIR Import Into Packaging

7 Setting Up Financial Aid Funds

8 Award Methodologies and Packaging

9 Award Letters and Adjustments

10 Workshop

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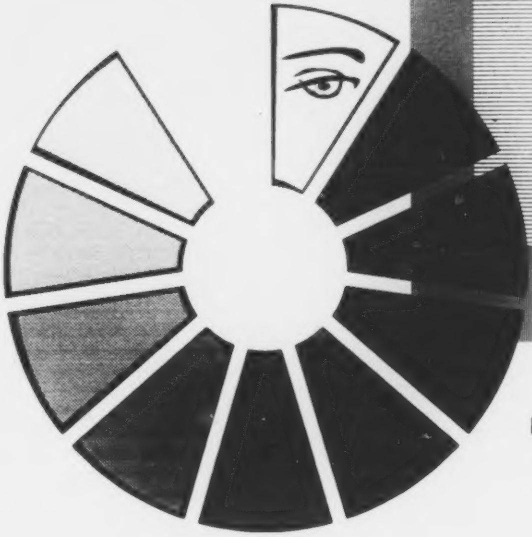
Chapter 1

Overview



This overview provides the concepts of electronic packaging and demonstrates how those electronic functions are implemented using EDExpress for Windows.

1 Overview

Objectives

1. Provide a common definition of an aid package.
2. Identify the benefits of electronic automation for the packaging process.
3. Define the steps to create an automated award.
4. Identify the features of the EDExpress packaging functions.

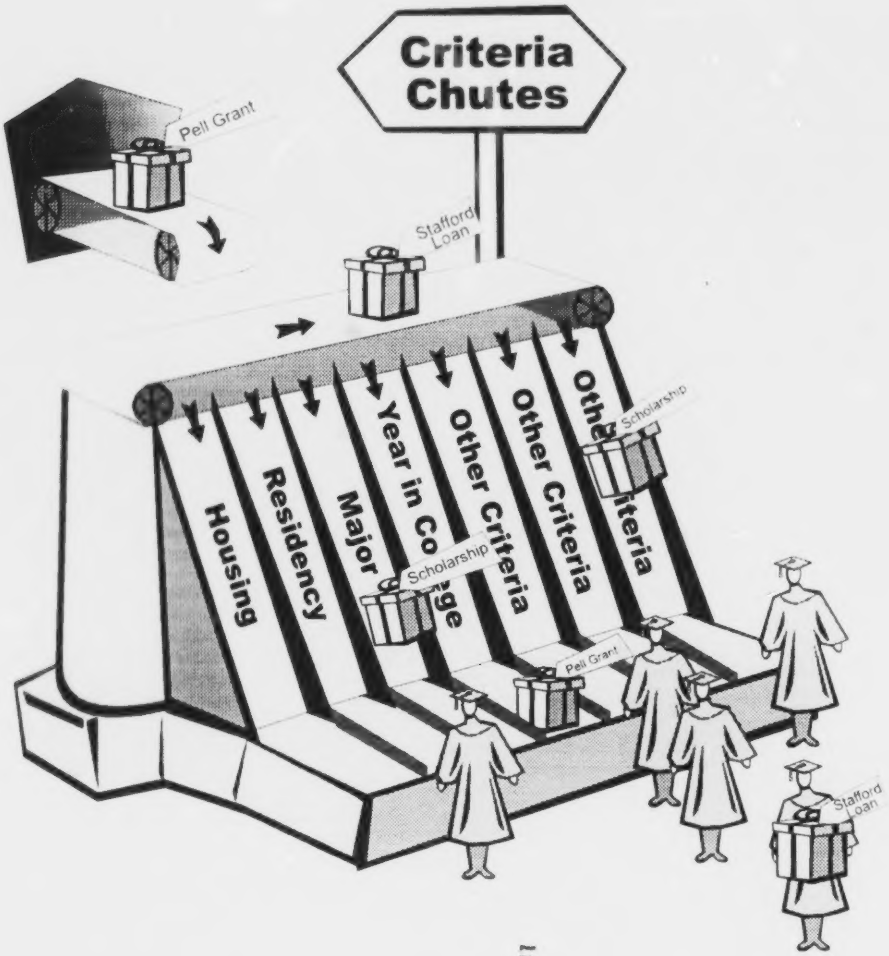
What is an Aid Package?

Financial aid packaging is the process of allocating limited funds (resources) to students using a select group of records.

Some of the commonly used terms for the allocation of funds a school uses are:

- Algorithm
- Methodology
- Funding Formula

No matter what you call the method or manner in which you go about allocating funds, you must still have documented or written procedures for how you award federal funds.


Criteria Chutes
Pell Grant
Stafford Loan
Housing
Residency
Major
Year in College
Other Criteria
Other Criteria
Other Criteria
Scholarship
Scholarship
Pell Grant
Stafford Loan

What is Electronic Aid Packaging?

An electronic aid package is a financial aid award that has been produced using a software product. (EDExpress, a third-party system, or something developed by your own staff) that applies your school's award methodology, fund sources and amounts, and other criteria automatically to one or all your students.

How Does it Work?

Let's begin by comparing sample components of an electronic packaging process to a paper process.

	Paper Process	Electronic Process
Academic Year	■ Review student's academic program ■ Write down	Automatically assigned on import
Budget	■ Review student's academic program and planned enrollment ■ Calculate budget and write down	Automatically assigned based on criteria setup in your software
Need	Use calculator to subtract EFC from budget or pencil to determine	Automatically calculated based on Expected Family Contribution (EFC) and assigned budget
Single Award	■ Look up Pell table ■ Review fund balances ■ Decide method based on information in file ■ Write down amounts	Automatically applies correct methodology based on criteria to allocate and automatically records funds to record
Multiple Award	N/A	Package all eligible students at once
Reports	■ Look through each file folder ■ Write or type information into list ■ Add up amounts for totals	■ Select report type and criteria ■ Automatically output list and totals ■ Uses queries to select specific records

Steps to Automated Packaging

Electronic packaging can be defined in three relatively seamless stages as follows:

1. System Setup

Define the components and parameters of your institution and methodology which include:

- Criteria
- Budgets
- Academic Year
- Funds to Be Awarded
- Award Methodology
- Document Tracking

2. Add Packaging Records

Records can be added to the software in a combination of three methods:

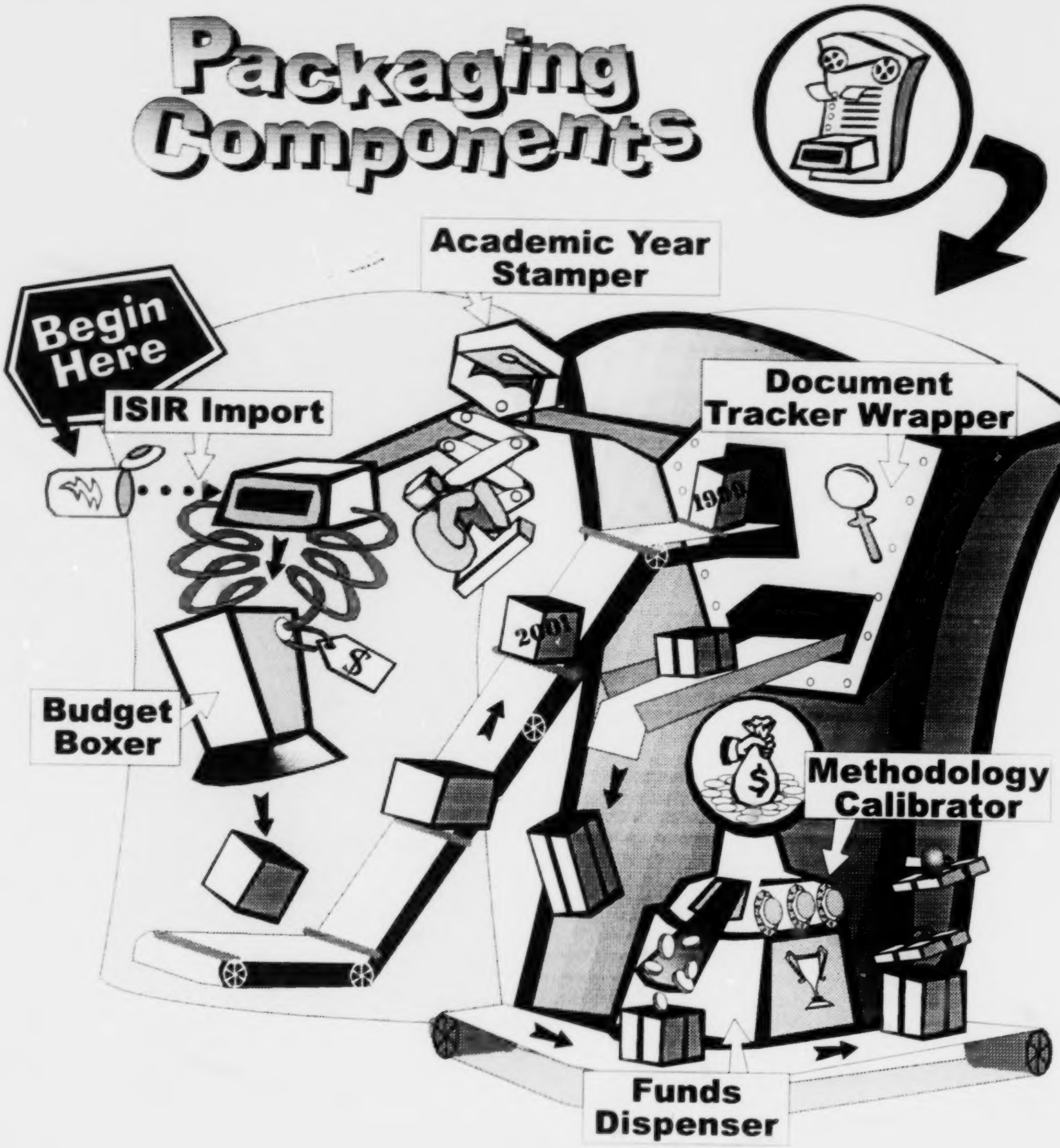
- Manual Entry
- ISIR Import
- External Import

3. Package

Automatically award funds to students using two methods:

- Single Record
- Global Process

Packaging Components


Academic Year Stamper
Begin Here
ISIR Import
Document Tracker Wrapper
1999
2001
$
Budget Boxer
Methodology Calibrator
$
Funds Dispenser

EDExpress Packaging Functions

The ISIR data imported into EDExpress will act as the source for much of the packaging process, i.e., grade level, dependency status, etc. All these components are criticial to the packaging process, and EDExpress offeres a simple integrated system.

Flexible Features

EDExpress provides the tools and flexibility to define your own parameters for awarding aid.

- Academic Year Profile
- Fund Maintenance
- Award Methodology
- Budgets
- User-Defined Formulas
- SAP Values
- Queries

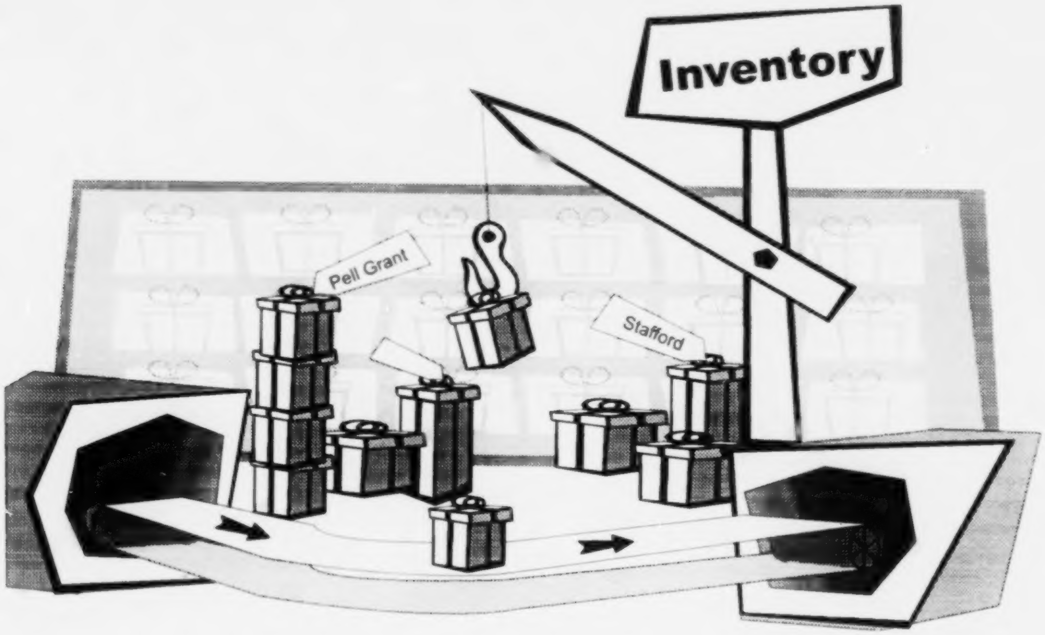
In addition, the software provides the flexibility for creating and using other optional features, such as:

- User-Defined Data
- User-Defined Letters
- Calculated Fields
- External Export
- Import External Add/Change

Reporting Functions

EDExpress provides several reports to assist you in managing your packaging data. These include:

- Funds Maintenance List
- Packaged Students List
- Unpackaged Students List
- Entered Packaging Records
- Packaging Setup Printout
- Measurement Tools Report
- FISAP - Eligible Dependent Students
- FISAP - Eligible Independent Students



Chapter 2

Query

The goal of Packaging is to have the software automatically perform as many of the steps in the award process as possible. Since the packaging process involves sorting and selecting objects (e.g., students, funds, documents) based on attribute(s), you must have a tool to select objects based on institutional criteria. The method that EDExpress uses for creating user-defined selection criteria is Query. The Query utility provides the tools to create and store selection criteria statements that may be used in many ways:

- Assign Budgets
- Assign Documents Required for Packaging
- Allocate Funds
- Select Funds
- Print Reports and Letters

Since each school uses different criteria for selecting records in the packaging process, the Query Management utility provides you the flexibility to create the selection statements you need using the data stored on the packaging record and data you enter using the user-defined fields.

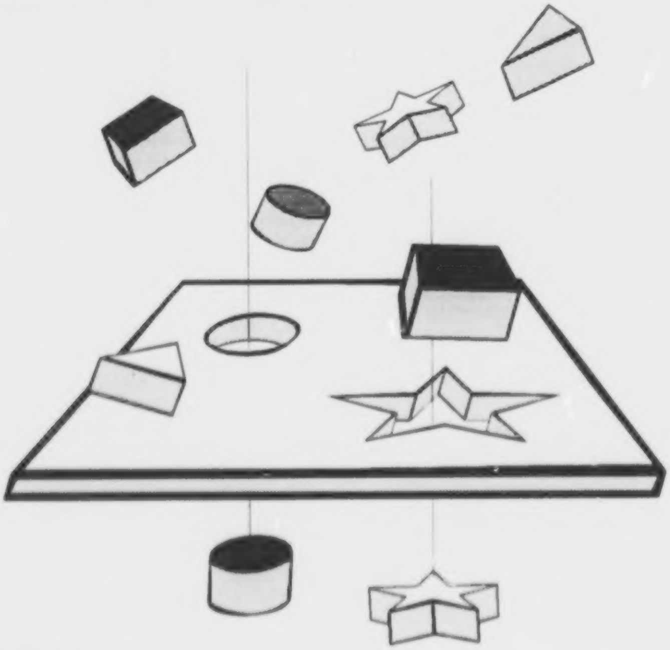
2 Query

Objectives

1. Recognize the reasons why queries are useful.
2. Identify fields that can be used in a query.
3. Define the query logic.
4. Build a query.
5. Create a user-defined field.
6. Use a user field in a query.

What is a Query?

A query is a logical statement or predefined set of criteria that describes a student population. Think of a query as a lid on a box with a geometric-shaped hole. Only objects that have the correct shape can be placed in the box; all others do not fit.



Why Create a Query?

You use a query to select or filter data. For instance, you may want a list that includes only dependent students or students who live on-campus, or you may want to limit a particular fund to students in a certain major. For each type of application you may define a query that best selects the desired group.

Some of the queries you will create in packaging will:

- Assign documents required for packaging
- Select funds to be awarded
- Allocate funds
- Assign budgets
- Print letters and reports

Tips for Queries

The Standard Query Language tool in EDExpress creates simple logical selection statements. When you construct a Query some basic rules apply:

- The only connectors available are AND and OR.
- The Query is processed from left to right or beginning to end.
- AND means all conditions that have been joined must be true for the Query to select records. If one or more AND(s) appear in a statement, the software applies the AND(s) from left to right in the statement.

Example

Dependency status = D AND *State of Residency = VA* AND *Verification selection = Y*

The software compares the dependency status first, then the residency, and finally the verification. If the record does not meet all three criteria, it is not selected.

- OR divides the query statement into sections and selects a record if any section is true.

Example

State of Residency = VA OR *State of Residency = DC*

The portion of the query before OR and the entire portion after OR are two complete statements. If either portion is true, the record is selected.

- If AND and OR are used in the same query statement you must use parentheses to separate them.
- Parentheses change the order of precedence. Expressions enclosed in parentheses are processed before AND and OR. In the case of nested expressions, innermost parentheses are processed first

Example

(State of Residency = VA OR *State of Residency = DC)* AND *Housing Code = 1*

In the above example, EDExpress first compares the parenthetical statement (state of residency) and then the housing code. If the record meets one of the first criteria and the second criteria, the record is selected.

- User Defined fields can be included in a query. Queries including a User Defined field can use both the AND and OR connectors.

Query Worksheet

SAMPLE

In the space below, describe the group of students to be selected. There are blank worksheets for your use included in Chapter 10-Workshop.

Select all students who are from either Virginia or the District of Columbia, and live on campus.

Data Element	**Operators**	**Value**
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value
State of Residency	=	*VA*
And ☐ Or ☒	Left (☒ Right) ☐	
State of Residency	=	*DC*
And ☒ Or ☐	Left (☐ Right) ☒	
Housing Code	=	*1*
And ☐ Or ☐	Left (☐ Right) ☐	
And ☐ Or ☐	Left (☐ Right) ☐	
And ☐ Or ☐	Left (☐ Right) ☐	

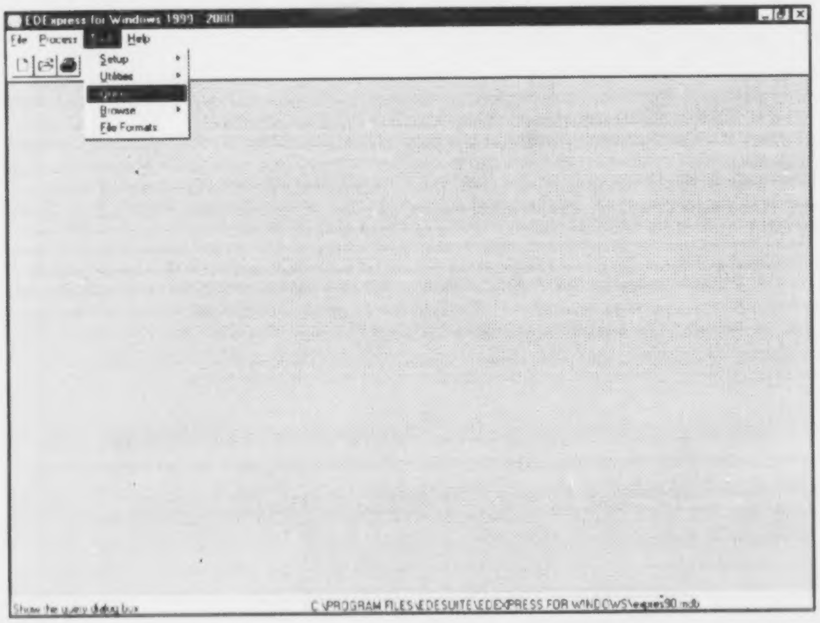
User Defined Query Worksheet Reference

Data Fields Available from the Packaging Record

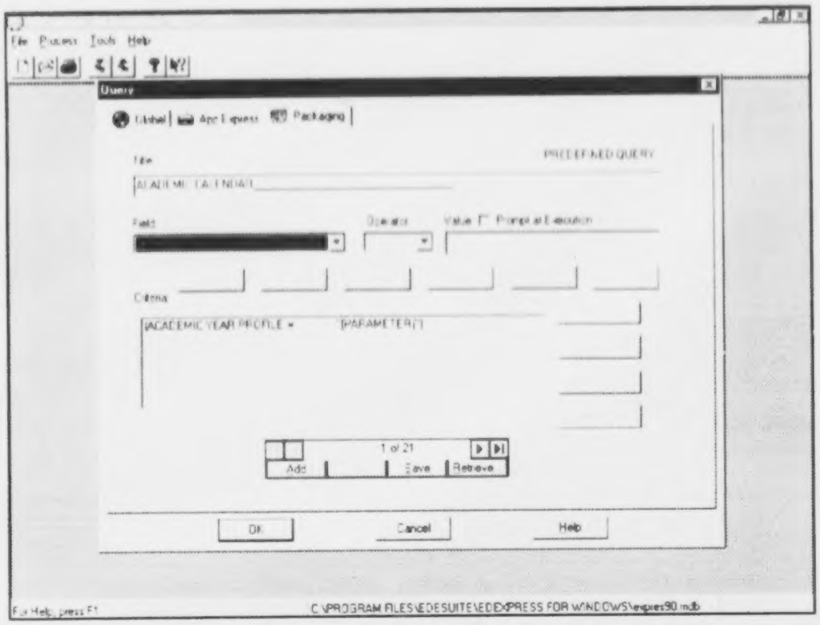
Academic Year Profile
Active Transaction
Active Transaction Date
Active Transaction ID
Add Date
Add Time
Add User ID
Alien Registration #
Amount of Pell
Auto Zero EFC
Award Letter
Award Letter Mailed Date
Award Letter Sent Count
Borrower Based
Budget Amount
Budget Code
Budget Title
Citizenship Status
College Grade Level
Current SSN
Date of Birth
Date of Birth Change Date
Date of Legal Residence
Date Ready for Packaging
Date Received by CPS
Default Status
Degree
Dependency Status
Direct Loan Plus
Direct Loan Subsidized
Direct Loan Unsubsidized
Document Add Date
Document Status
Drivers License #
Drivers License State
EFC
Enrollment
Estimated Pell Grant
Export to External System
First Name
Fund Aid Type
Fund Calculated Value
Fund Code
Fund Current Total of Amounts
Fund Decision to Accept
Has Correction Record
Has Document Tracking Record
Has FAFSA Record
Has Loan Record
Has Notes Record
Has NSLDS Record
Has Packaging Record
Has Pell Record
Has RAD Record
Has Verification Worksheet Record
Housing Code
Institution Use
Interested in Student Loans
Interested in Work Study
Last Mailed Date
Last Name
Letter Count
Loan Interview Completed
Local Address
Local Address Change Date
Local City
Local Phone
Local State
Local Zip Code
Methodology Code
Middle Initial
Name ID
Original SSN
Over Award Indicator
Packaging Record Source
Packaging Results
Packaging Status
Pell EFC
Pell Eligible Flag
Pell Verification Status
Permanent Address
Permanent Address Change Date
Permanent City
Permanent Phone
Permanent State
Permanent Zip Code
Previous Transaction
Process Date
Record Source
Remaining Need
Satisfactory Academic Progress
Simplified Needs
SSN Change Date
State of Legal Residence
Student's Original SSN
Term
Total Income
Trans Paid On
Transaction #
Unmet Need Amount
Update Date
Update Time
Update User ID
User Defined Formula 1
User Defined Formula 2
User Defined Formula 3
User Defined Formula 4
Verification Type

Creating a Query

In EDExpress, queries are created for different functions: Global, App Express, Packaging, and Direct Loan. Each contains a different set of data fields from which to choose. In this example we will create a query using the Query Worksheet and the Packaging fields.


EDExpress for Windows 1999 - 2000
File
Process
Help
Setup
Utilities
Query
Browse
File Formats
Show the query dialog box
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*To create a new query, select **Tools**, **Query** from the main menu.*


File
Process
Tools
Help
Query
Global
App Express
Packaging
PREDEFINED QUERY
Title
Field
Operator
Value
☐ Prompt at Execution
Criteria
1 of 21
Add
Save
Retrieve
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Title: ACADEMIC CALENDAR

Criteria: [ACADEMIC YEAR PROFILE = [PARAMETER]]

*Click on the **Packaging** tab.*

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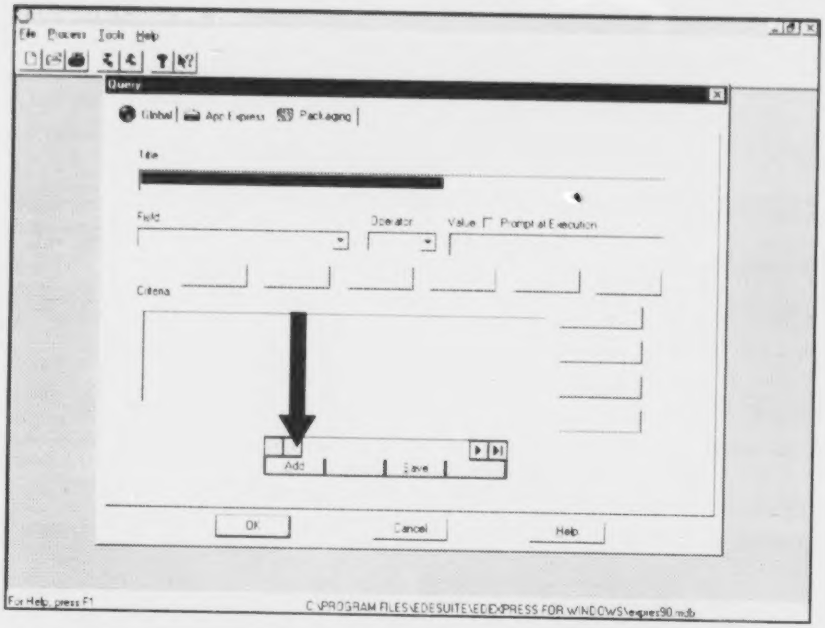
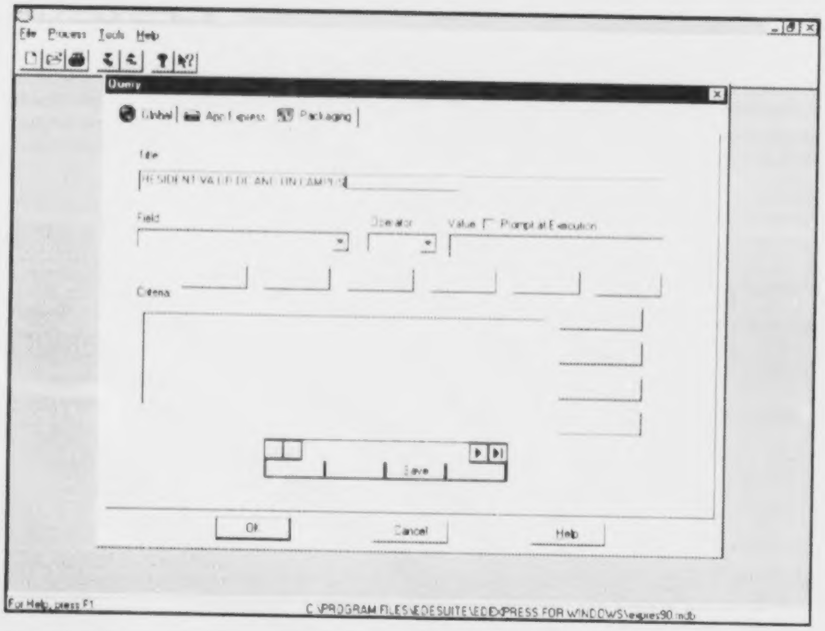
The Query dialog box is displayed if a record had been previously entered. You need to select ***Add*** *to enter a new record.*

If not, EDExpress automatically opens a new record and you can begin entering information.


File Process Tools Help
Query
Global
App Express
Packaging
Title
Field
Operator
Value
Prompt at Execution
Criteria
Add
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Type a free-form title for your query.

This title should contain enough description so that you can easily identify the query when you need to use it.


File Process Tools Help
Query
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Operator
Value
Prompt at Execution
Criteria
Save
OK
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Help
For Help, press F1
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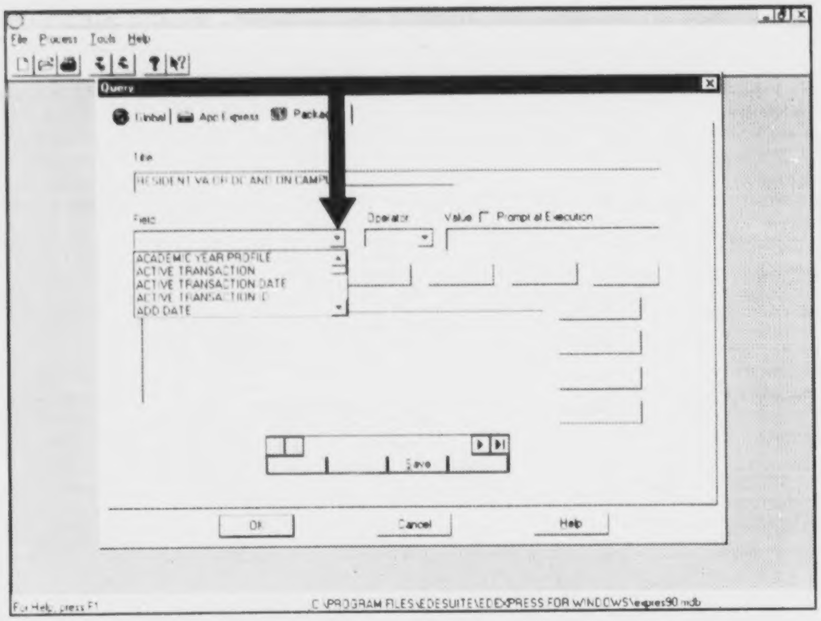
Tip:

Include a description of the query's intended use in the title. If the query is for a fund, include the fund name. If it is for a budget, include the budget name.

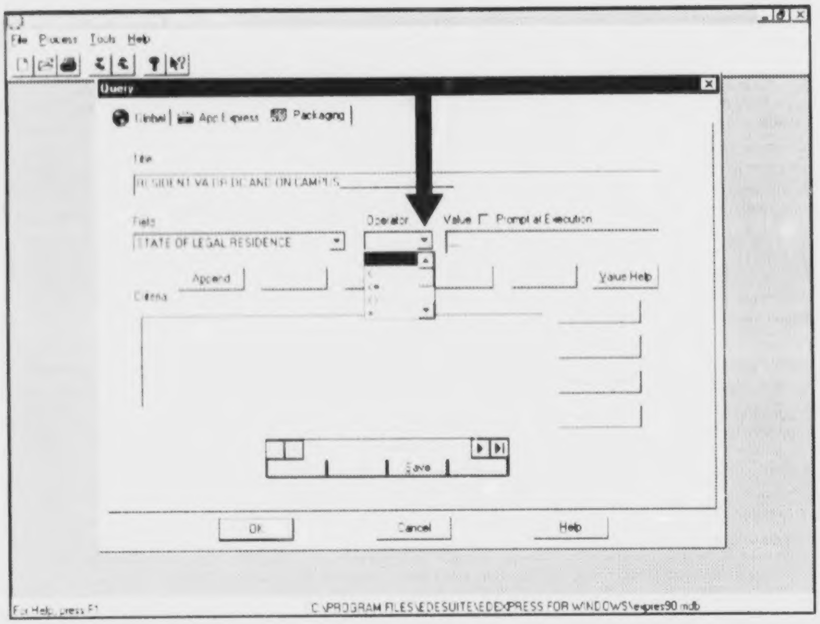

File Process Tools Help
Query
Global
App Express
Packaging
Title
Field
Operator
Value
Prompt at Execution
ACADEMIC YEAR PROFILE
ACTIVE TRANSACTION
ACTIVE TRANSACTION DATE
ACTIVE TRANSACTION ID
ADD DATE
Save
OK
Cancel
Help
For Help, press F1

Title: RESIDENT VA OR DC AND ON CAMPUS

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Click the down arrow to see the list of fields in the Packaging record

*Select the desired field with the cursor and click or press **Enter***


File Process Tools Help
Query
Global
App Express
Packaging
Title
Field
Operator
Value
Prompt at Execution
Append
Value Help
Criteria
Save
OK
Cancel
Help
For Help, press F1

Title: RESIDENT VA OR DC AND ON CAMPUS

Field: STATE OF LEGAL RESIDENCE

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Do you have more than one criterion? Think about which connector (operator) you need to use here.

Click the down arrow to see the full list of operators.

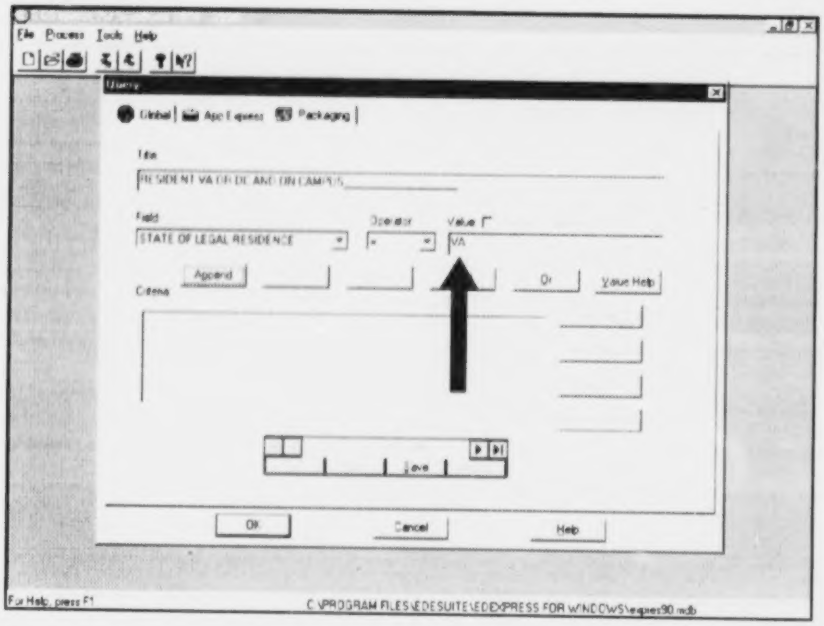
*Select the operator to be used with the cursor and click or press **Enter**.*

The operator valid field contents are:

Equal to	=
Not equal to	<>
Less than	<
Greater than	>
Less than or equal	<=
Greater than or equal	>=
Like	Contains
Not Like	Doesn't Contain

Type the value of the selected field you measure against.

*Since we know the valid value for Virginia is VA, we will type **VA** in the value field.*


File Process Tools Help
Query
Global
App Express
Packaging
Append
Or
Value Help
Criteria
OK
Cancel
Help
For Help, press F1
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Title: RESIDENT VA OR DC AND ON CAMPUS

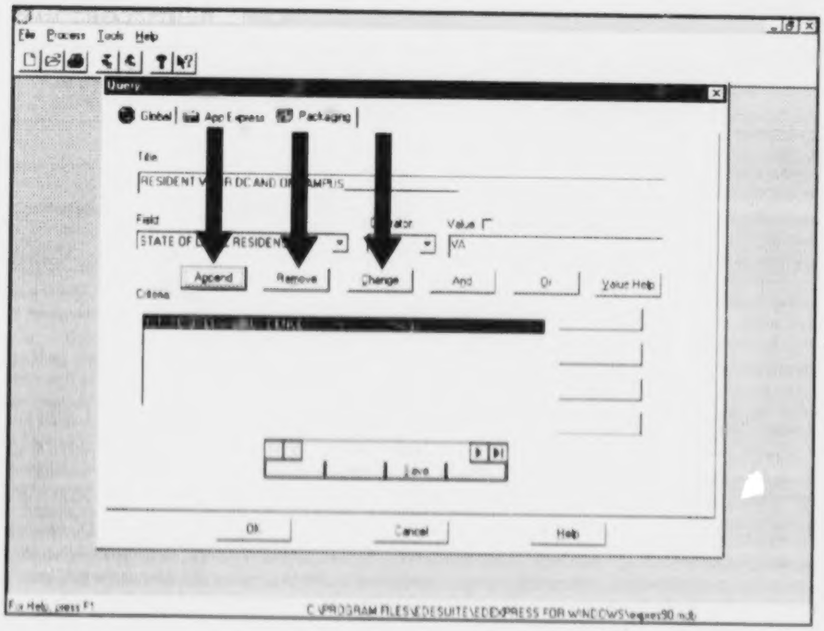
Field: STATE OF LEGAL RESIDENCE

Operator: =

Value: VA

*Click the **Append** button to add the statement to the query.*

*Note the **Remove** and **Change** buttons are now active.*


File Process Tools Help
Query
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Criteria
OK
Cancel
Help
For Help, press F1
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Title: RESIDENT VA OR DC AND ON CAMPUS

Field: STATE OF LEGAL RESIDENCE

Value: VA

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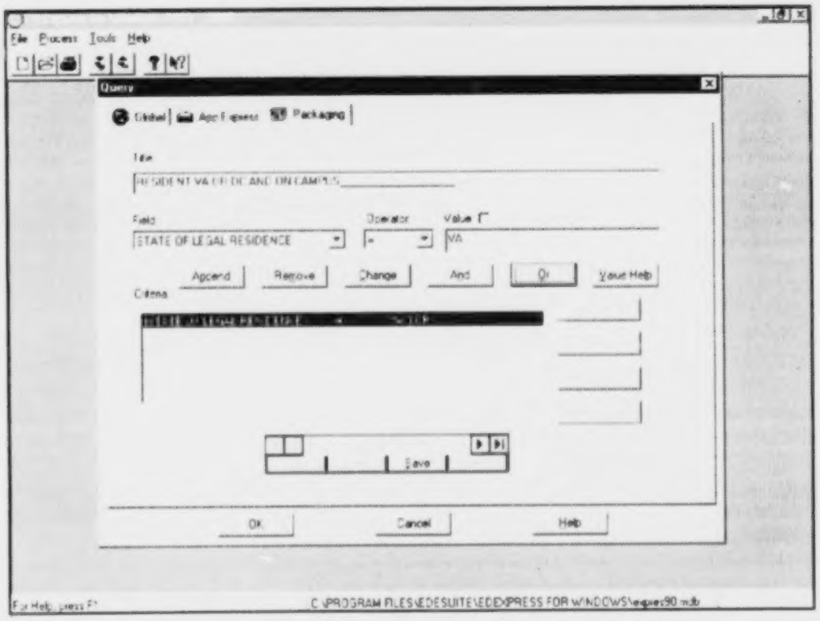

File Process Tools Help
Query
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Append
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OK
Cancel
Help
Save
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Title: RESIDENT VA OR DC AND ON CAMPUS

Field: STATE OF LEGAL RESIDENCE

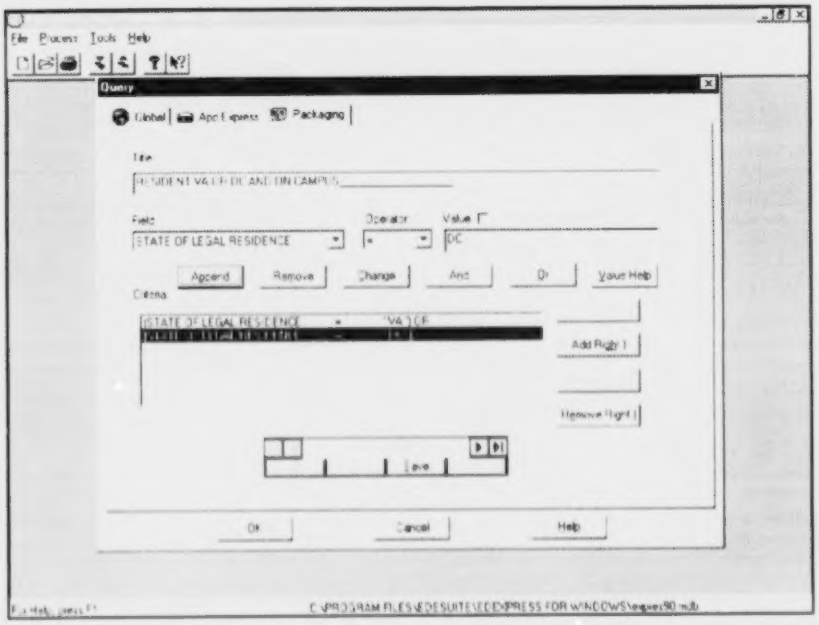
Operator: =

Value: VA

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Click **AND** or **OR** if your query has additional statements.*

*Since we need students from VA or DC, we will click **OR**.*



File Process Tools Help
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Value Help
Add Right)
Remove Right)
OK
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Help
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For Help, press F1

Title: RESIDENT VA OR DC AND ON CAMPUS

Field: STATE OF LEGAL RESIDENCE

Operator: =

Value: DC

Criteria: STATE OF LEGAL RESIDENCE = 'VA' OR

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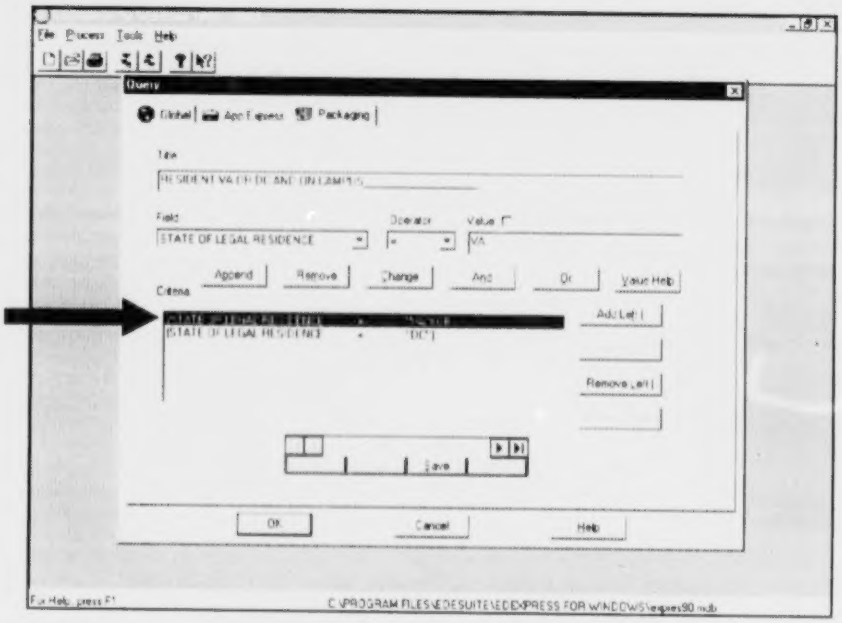
*Change the value field to DC and click **Append** to add the statement to the query.*

*Note that the **Add Right)** and **Remove Right)** are now active.*

In this example, we must also add a criteria for on-campus housing status. To do this, we must separate the ***OR*** *statement from the* ***AND*** *portion of the statement. Click the top line of the query statement.*



Title: RESIDENT VA OR DC AND ON CAMPUS

Field: STATE OF LEGAL RESIDENCE

Operator: =

Value: VA

Criteria:

(STATE OF LEGAL RESIDENCE = "DC")

File Process Tools Help
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Or
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Remove Left (
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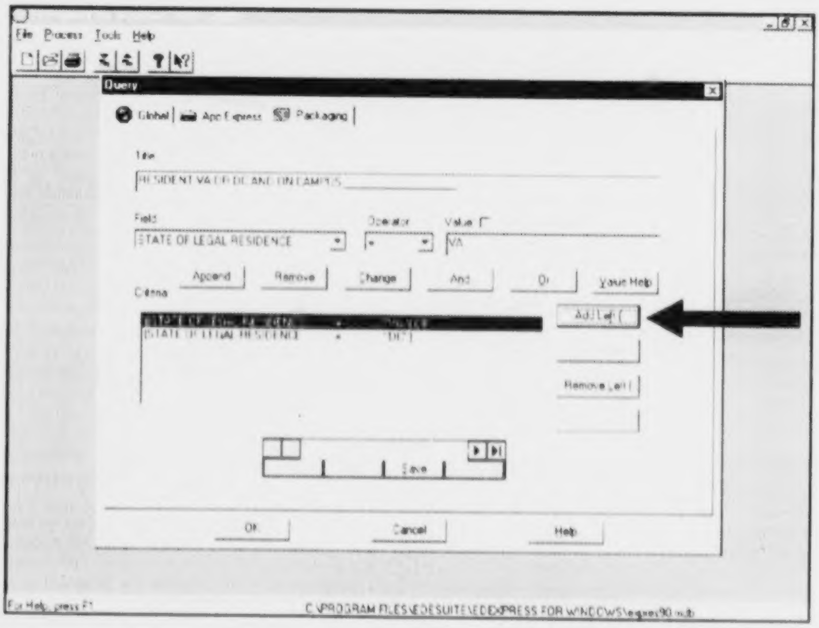
Click the ***Add Left (*** *button to add a left parenthesis to the statement.*



Title: RESIDENT VA OR DC AND ON CAMPUS

Field: STATE OF LEGAL RESIDENCE

Operator: =

Value: VA

Criteria:

(STATE OF LEGAL RESIDENCE = "DC")

File Process Tools Help
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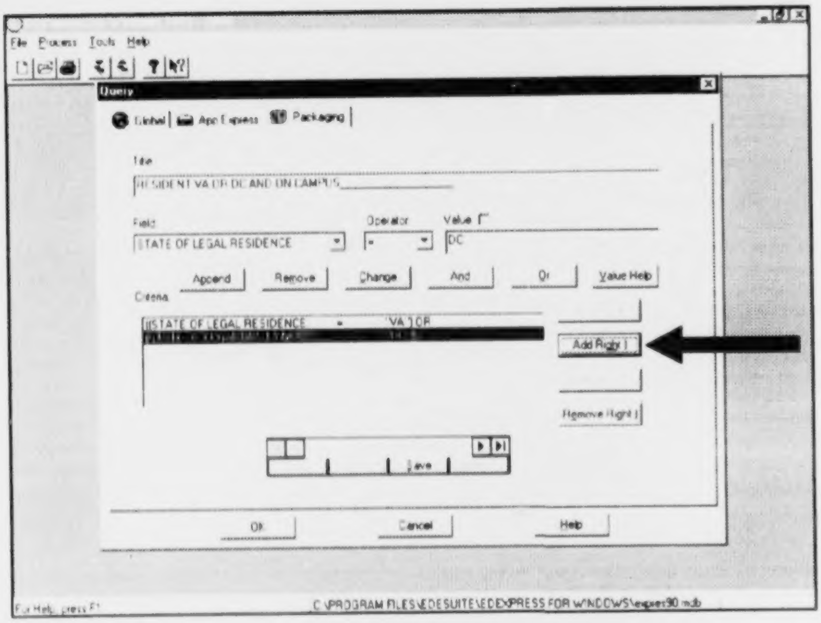
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For Help, press F1
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Title: RESIDENT VA OR DC AND ON CAMPUS

Field: STATE OF LEGAL RESIDENCE

Operator: =

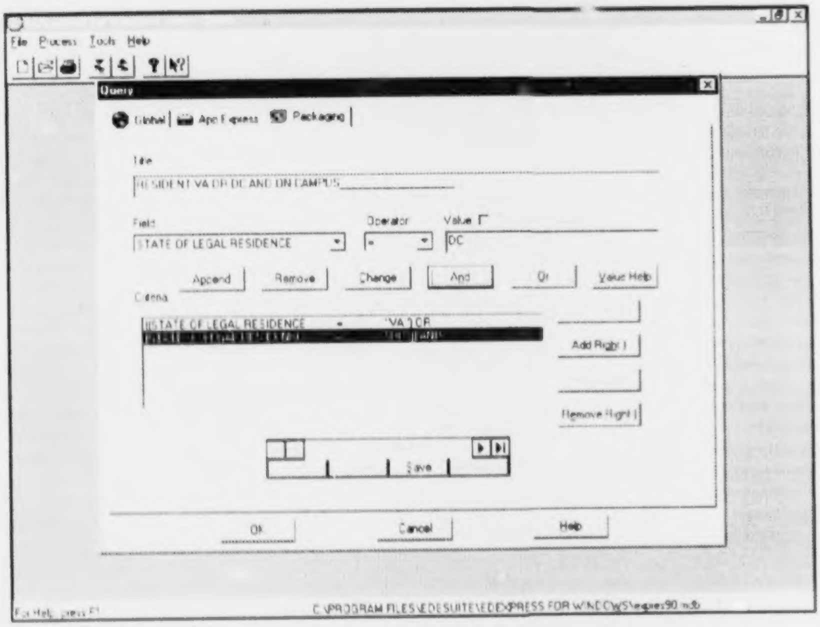
Value: DC

Criteria:

((STATE OF LEGAL RESIDENCE = 'VA') OR

[illegible]

*Click the bottom line of the statement and then the **Add Right)** button to add a right parenthesis.*


File Process Tools Help
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Remove Right)
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OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Title: RESIDENT VA OR DC AND ON CAMPUS

Field: STATE OF LEGAL RESIDENCE

Operator: =

Value: DC

Criteria:

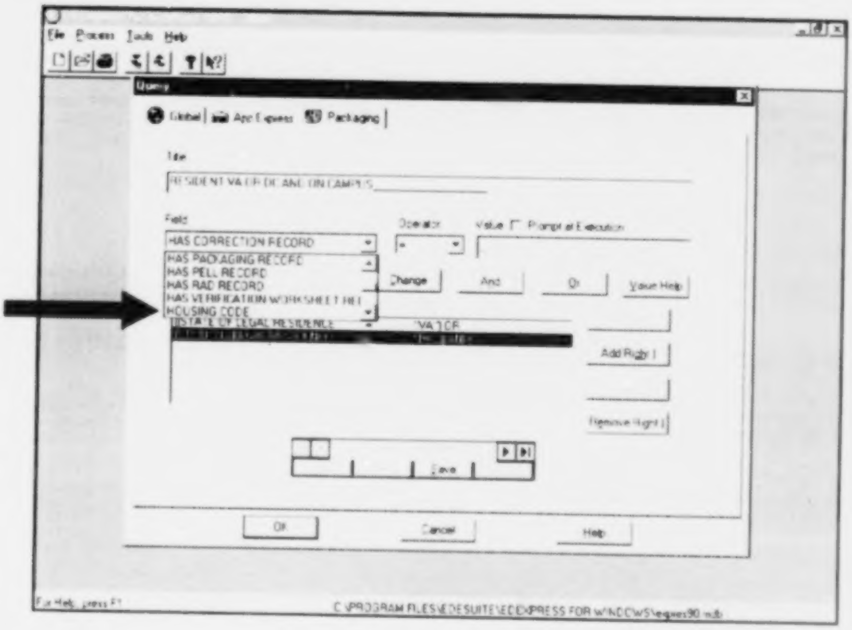
((STATE OF LEGAL RESIDENCE = 'VA') OR

[illegible] AND

*Now we're ready to begin the second part of the statement. Click the **AND** button.*

*Select **Housing Code** in the field box.*

We will leave the operator at equals (=).


File Process Tools Help
Query
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App Express
Packaging
Title
Field
Operator
Value
Prompt at Execution
Change
And
Or
Value Help
Add Right
Remove Right
Save
OK
Cancel
Help
For Help, press F1

Title: RESIDENT VA OR DC AND ON CAMPUS

Field: HAS CORRECTION RECORD

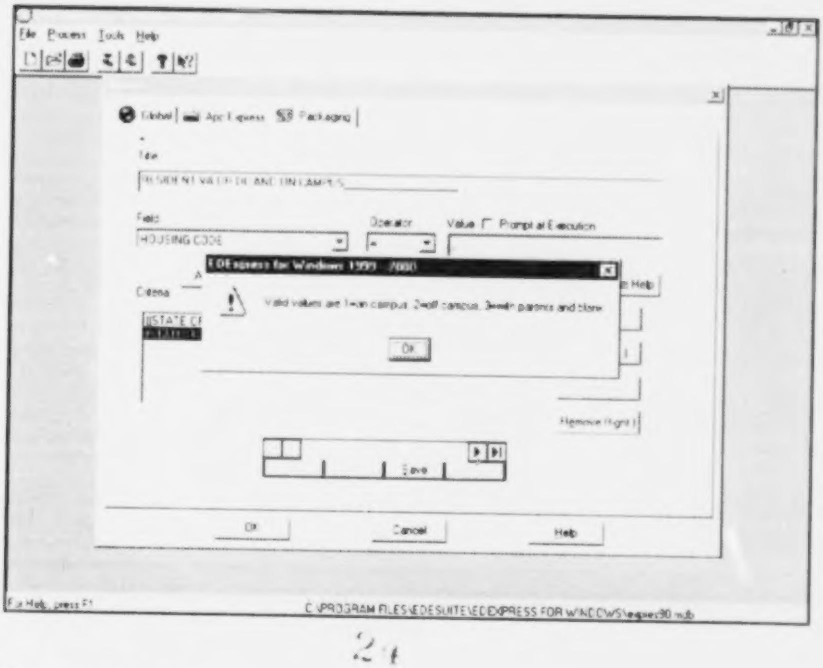
Operator: =

- HAS PACKAGING RECORD
- HAS PELL RECORD
- HAS RAD RECORD
- HAS VERIFICATION WORKSHEET REC
- HOUSING CODE

(STATE OF LEGAL RESIDENCE = 'VA' OR

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*To find the value for on-campus, we will click **Value Help**. All the possible values are listed.*


File Process Tools Help
Global
App Express
Packaging
Title
Field
Operator
Value
Prompt at Execution
Criteria
Value Help
OK
Remove Right
Save
OK
Cancel
Help
For Help, press F1

Title: RESIDENT VA OR DC AND ON CAMPUS

Field: HOUSING CODE

Operator: =

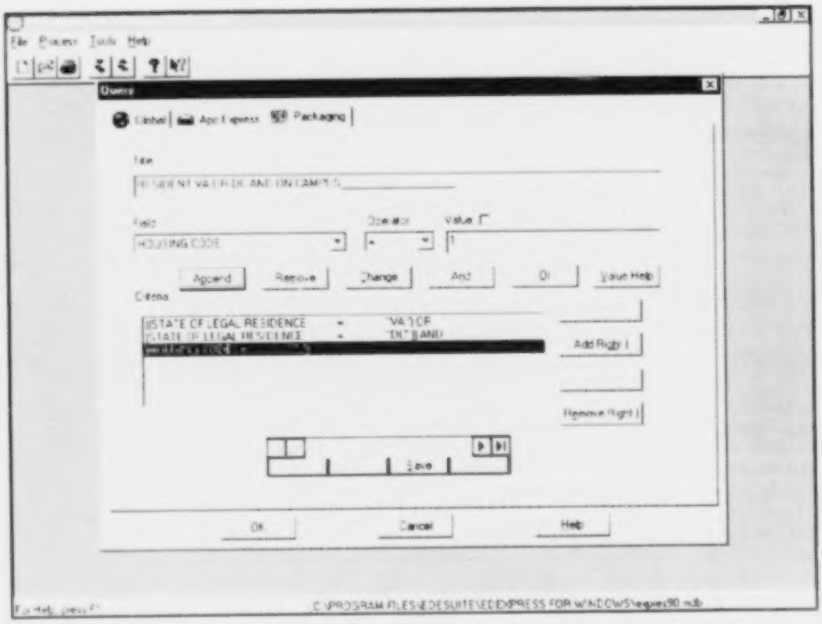
(STATE OF

EDExpress for Windows 1999 - 2000

Valid values are 1=on campus, 2=off campus, 3=with parents and blank

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

BEST COPY AVAILABLE


File Process Tools Help
Query
Global
App Express
Packaging
Title
Field
Operator
Value
Append
Remove
Change
And
Or
Value Help
Criteria
Add Right)
Remove Right)
Save
OK
Cancel
Help
For Help, press F1

Field: HOUSING CODE

Operator: =

Value: 1

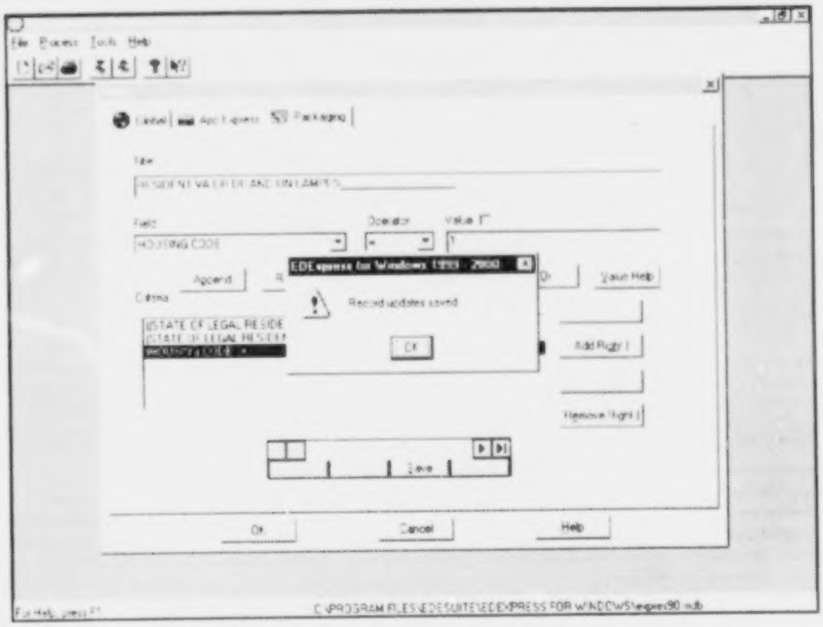
Criteria:

(STATE OF LEGAL RESIDENCE = "VA" OR

(STATE OF LEGAL RESIDENCE = "DC") AND

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Enter **1** in the value field and click **Append** to add the statement to the query.*


File Process Tools Help
Global
App Express
Packaging
Title
Field
Operator
Value
Append
Value Help
Criteria
Add Right)
Remove Right)
Save
OK
Cancel
Help
For Help, press F1

Field: HOUSING CODE

Operator: =

Value: 1

EDExpress for Windows 1999 - 2000

Record updates saved.

OK

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Click **Save** to save the query.*

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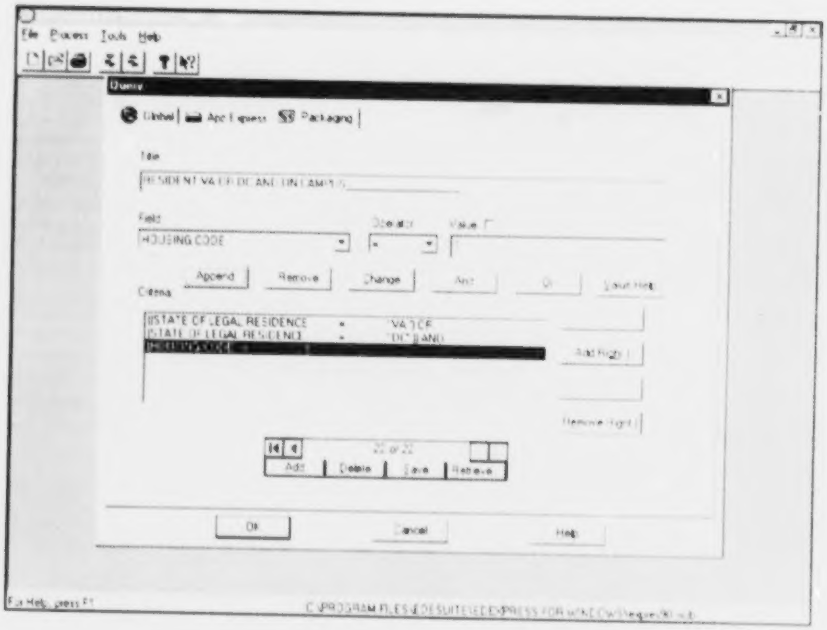
The completed query will identify students from Virginia or the District of Columbia who live on campus.


File Process Tools Help
Query
Global
App Express
Packaging
Title
Field
Operator
Value
Append
Remove
Change
And
Or
Value Help
Criteria
Add Right
Remove Right
Add
Delete
Save
Retrieve
OK
Cancel
Help
For Help, press F1

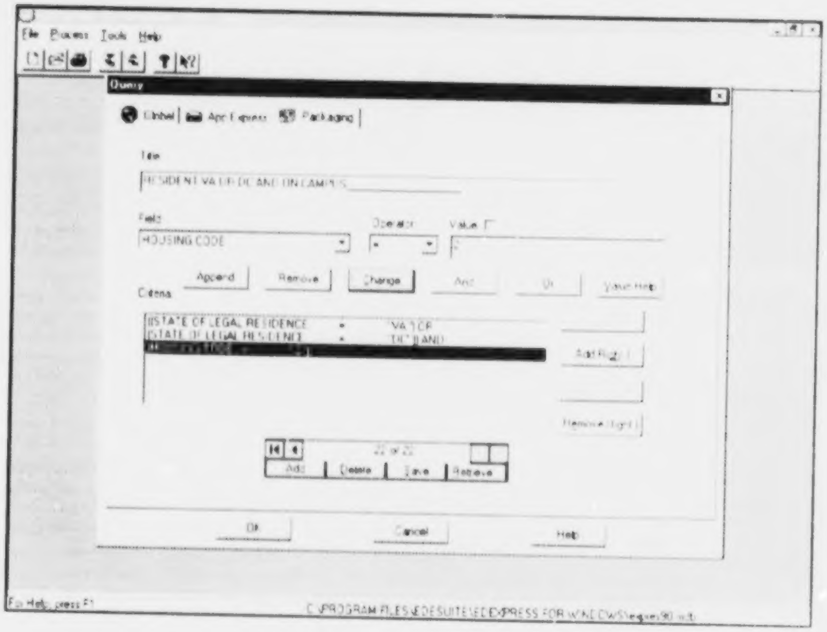
Title: RESIDENT VA OR DC AND ON CAMPUS

Field: HOUSING CODE

(STATE OF LEGAL RESIDENCE = 'VA' OR
STATE OF LEGAL RESIDENCE = 'DC') AND
HOUSING CODE =

You can change any of the fields at any time.

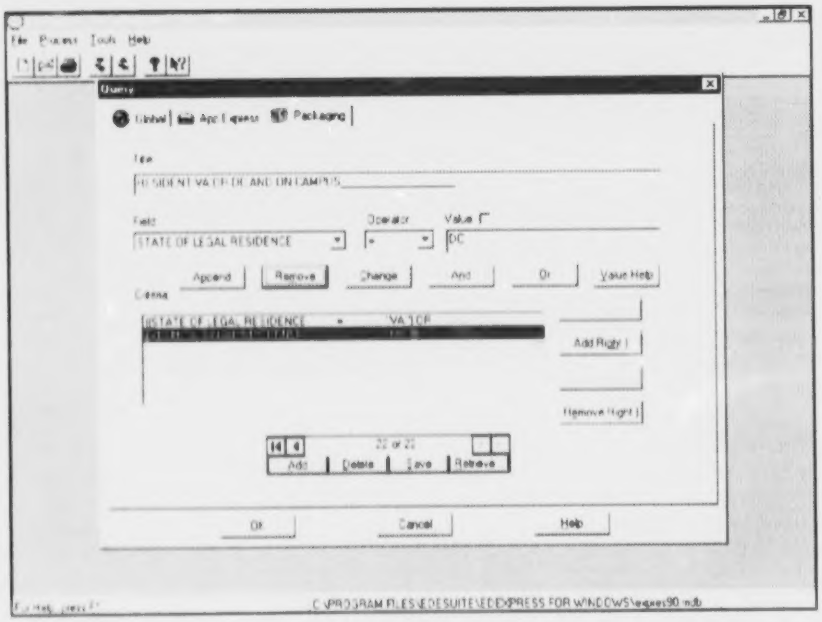
1. *Click the line you want to change.*
2. *Click the* **Change** *button.*
3. *In this example, we will go to the Value field and change it to* **2**.
4. *Click the* **Change** *button again and the 2 appears in the highlighted line of the statement.*


File Process Tools Help
Query
Global
App Express
Packaging
Title
Field
Operator
Value
Append
Remove
Change
And
Or
Value Help
Criteria
Add Right
Remove Right
Add
Delete
Save
Retrieve
OK
Cancel
Help
For Help, press F1

Title: RESIDENT VA OR DC AND ON CAMPUS

Field: HOUSING CODE

(STATE OF LEGAL RESIDENCE = 'VA' OR
STATE OF LEGAL RESIDENCE = 'DC') AND

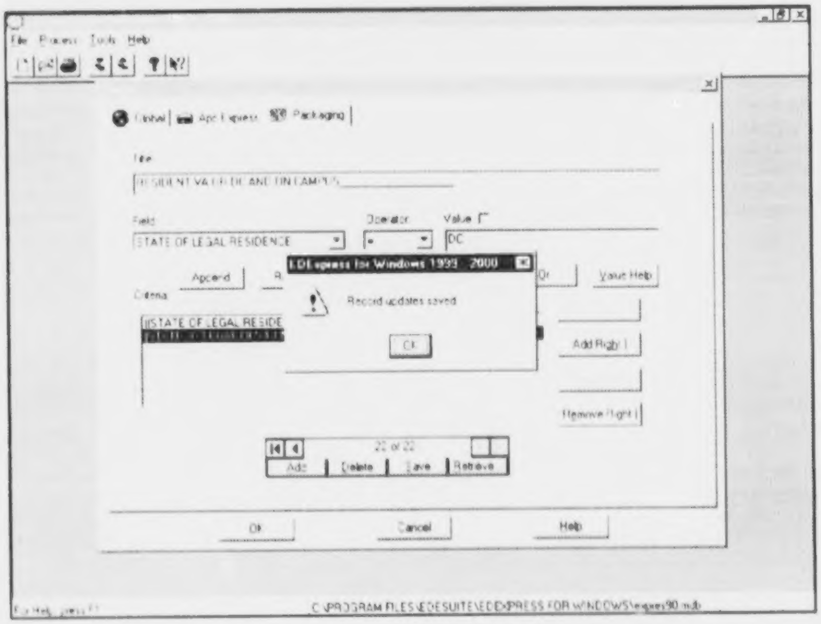


File
Process
Tools
Help
Query
Global
App Express
Packaging
Title
Field
Operator
Value
Append
Remove
Change
And
Or
Value Help
Criteria
Add Right)
Remove Right)
22 of 22
Add
Delete
Save
Retrieve
OK
Cancel
Help

Field: STATE OF LEGAL RESIDENCE
Operator: =
Value: DC

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\eqxes90.mdb

You can also remove lines from a query statement at any time. Simply highlight the line and click the **Remove** button.



File
Process
Tools
Help
Global
App Express
Packaging
Title
Field
Operator
Value
Append
Or
Value Help
Criteria
Add Right)
Remove Right)
22 of 22
Add
Delete
Save
Retrieve
OK
Cancel
Help

Field: STATE OF LEGAL RESIDENCE
Operator: =
Value: DC

EDExpress for Windows 1999 - 2000

Record updates saved

OK

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\eqxes90.mdb

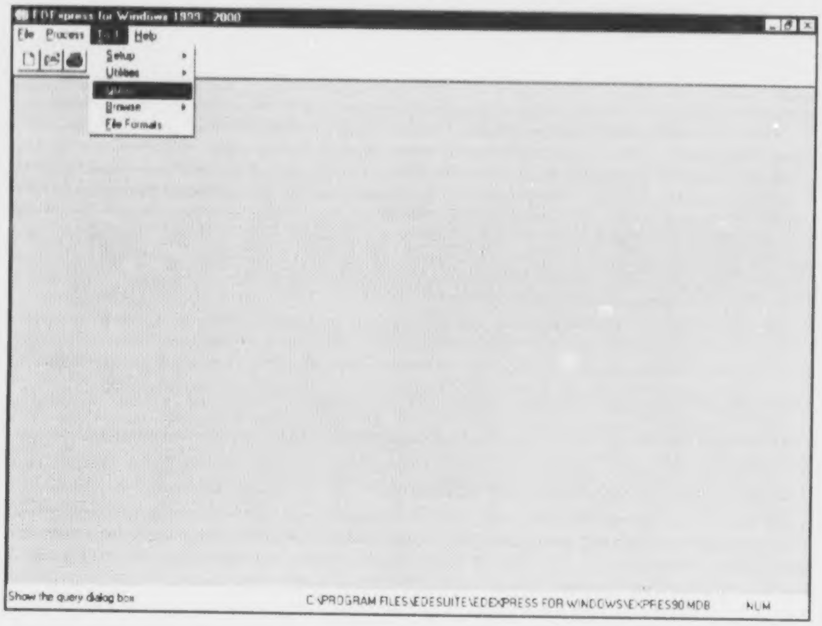
Click **Save** when you have finished.

Predefined Queries

EDExpress comes with a set of predefined queries commonly used in App Express, Packaging, Direct Loan, and Pell. Wherever the Selection Criteria option is available in EDExpress (for example, in Print and Export), you can use these queries to identify groups of records.

Although you cannot change a predefined query, you can use them as templates to create your own queries.

Select ***Tools/Query*** *from the menu bar.*


EDExpress for Windows 1999 - 2000
File
Process
Help
Setup
Utilities
Browse
File Formats
NUM

Show the query dialog box

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\EXPRES90.MDB

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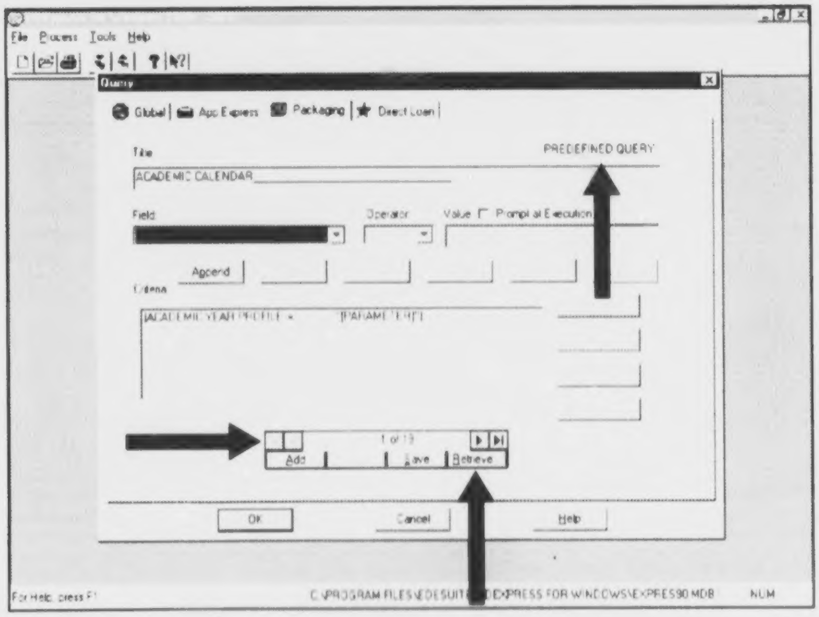


File Process Tools Help
Query
Global
App Express
Packaging
Direct Loan
PREDEFINED QUERY
Field
Operator
Value
☐ Prompt at Execution
Append
1 of 19
Add
Save
Retrieve
OK
Cancel
Help
For Help, press F1
NUM

Title: ACADEMIC CALENDAR

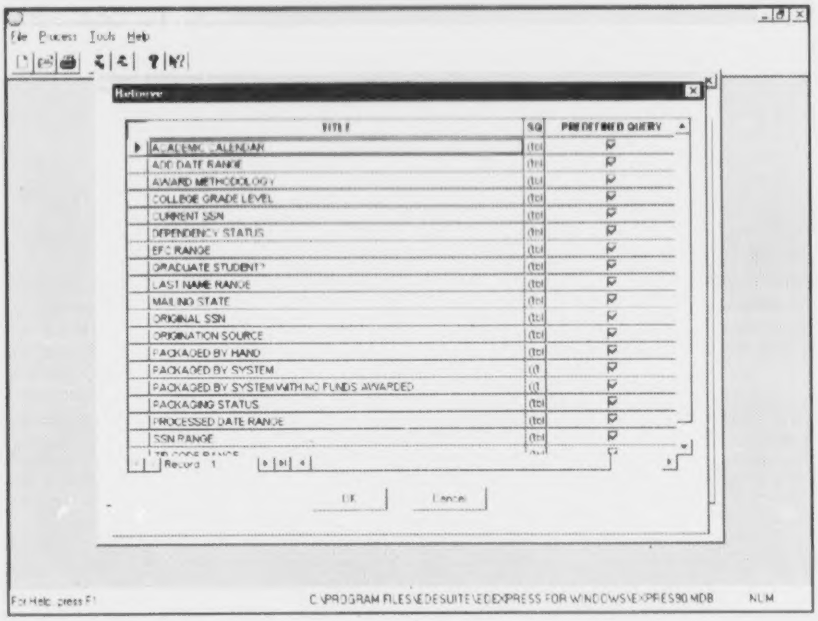
Criteria: [ACADEMIC YEAR PROFILE = [PARAMETER]]

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\EXPRES90.MDB

When you open the Query dialog box for the first time, you'll see that the predefined queries are stored as the first set of records in the Query database. You'll know a query is predefined if you see "PREDEFINED QUERY" in the upper right corner of the Query dialog box.

You can use the arrow buttons to scroll through the predefined queries, or you can click the ***Retrieve*** *button to see a list of the queries in your database.*

Click ***Retrieve****.*



File Process Tools Help
Retrieve
Record 1
OK
Cancel
For Help, press F1
NUM

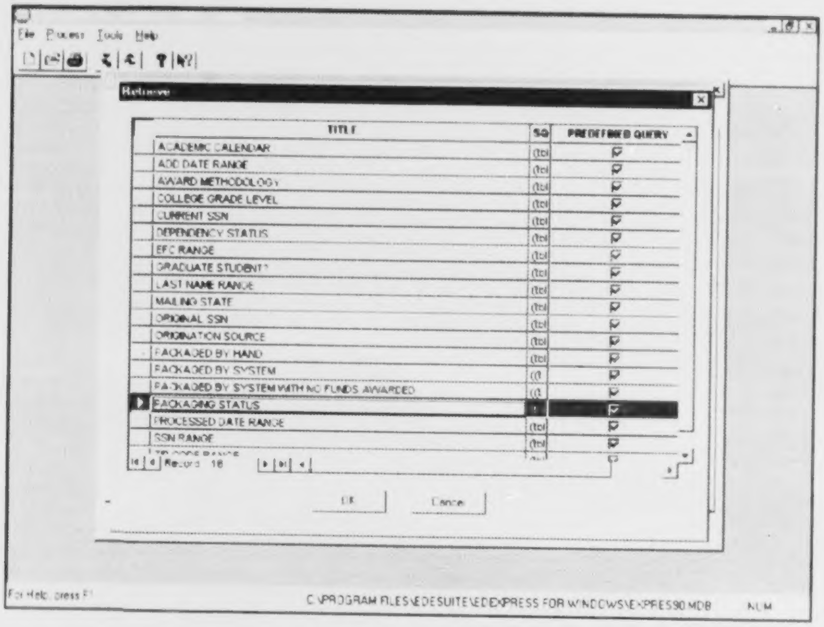
TITLE	SQ	PREDEFINED QUERY
ACADEMIC CALENDAR	(tbl	☑
ADD DATE RANGE	(tbl	☑
AWARD METHODOLOGY	(tbl	☑
COLLEGE GRADE LEVEL	(tbl	☑
CURRENT SSN	(tbl	☑
DEPENDENCY STATUS	(tbl	☑
EFC RANGE	(tbl	☑
GRADUATE STUDENT?	(tbl	☑
LAST NAME RANGE	(tbl	☑
MAILING STATE	(tbl	☑
ORIGINAL SSN	(tbl	☑
ORIGINATION SOURCE	(tbl	☑
PACKAGED BY HAND	(tbl	☑
PACKAGED BY SYSTEM	(t	☑
PACKAGED BY SYSTEM WITH NO FUNDS AWARDED	(t	☑
PACKAGING STATUS	(tbl	☑
PROCESSED DATE RANGE	(tbl	☑
SSN RANGE	(tbl	☑

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\EXPRES90.MDB

Here is a list of predefined queries in the database.

In this example, we will select the query with the title "Packaging Status" to use as a template.

Click **OK** to continue.


File Process Tools Help
Retrieve

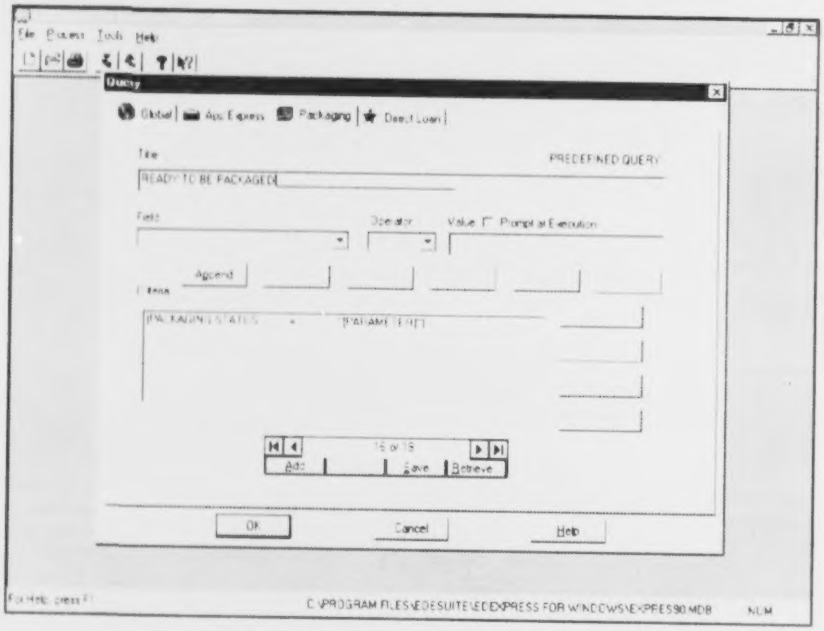
TITLE	SQ	PREDEFINED QUERY
ACADEMIC CALENDAR	(tbl	☑
ADD DATE RANGE	(tbl	☑
AWARD METHODOLOGY	(tbl	☑
COLLEGE GRADE LEVEL	(tbl	☑
CURRENT SSN	(tbl	☑
DEPENDENCY STATUS	(tbl	☑
EFC RANGE	(tbl	☑
GRADUATE STUDENT?	(tbl	☑
LAST NAME RANGE	(tbl	☑
MAILING STATE	(tbl	☑
ORIGINAL SSN	(tbl	☑
ORIGINATION SOURCE	(tbl	☑
PACKAGED BY HAND	(tbl	☑
PACKAGED BY SYSTEM	((t	☑
PACKAGED BY SYSTEM WITH NO FUNDS AWARDED	((t	☑
PACKAGING STATUS		☑
PROCESSED DATE RANGE	(tbl	☑
SSN RANGE	(tbl	☑

Record 16

OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\EXPRES90.MDB
NUM

In order to create a new query, we must first enter a new title. In this example, we will create a query for students who are ready to be packaged.

Enter **READY TO BE PACKAGED** in the title field.


File Process Tools Help
Query
Global
App Express
Packaging
Direct Loan
PREDEFINED QUERY
Field
Operator
Value
Prompt at Execution
Append
Criteria
Add
Save
Retrieve
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\EXPRES90.MDB
NUM

Title: READY TO BE PACKAGED

[PACKAGING STATUS] = [PARAMETER]

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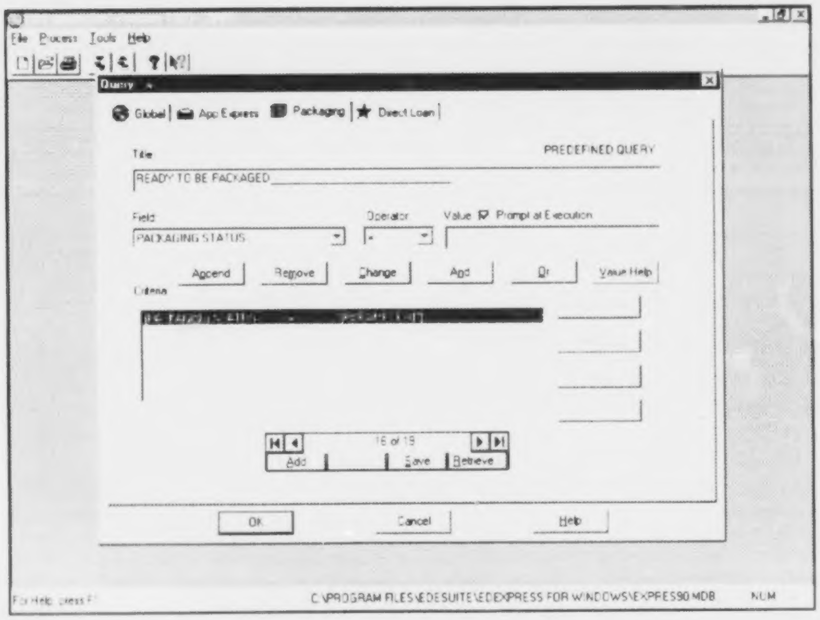
File Process Tools Help
Query
Global
App Express
Packaging
Direct Loan
Append
Remove
Change
And
Or
Value Help
Add
Save
Retrieve
OK
Cancel
Help
For Help, press F1
NUM

Title: READY TO BE PACKAGED

PREDEFINED QUERY

Field: PACKAGING STATUS

Operator: =

Value ☑ Prompt at Execution

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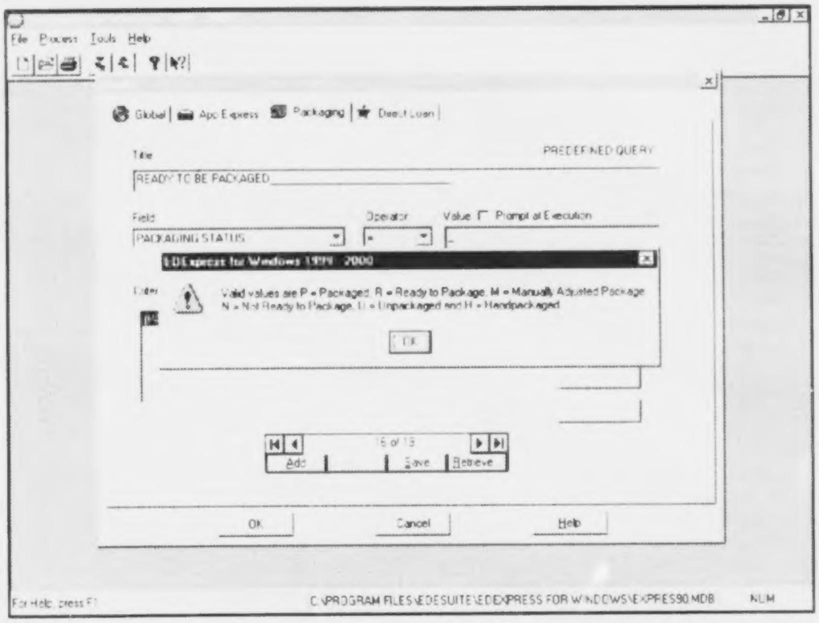
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\EXPRESS90.MDB

Click the data line in the criteria box to automatically fill in the field, operator, and value. For this record, the ***Prompt at Execution*** *box is checked since this formula does not include a value. Click on the checkbox to change this option. Since we want only students who are ready to be packaged, we must fill in the value field with the correct code.*

Click ***Value Help*** *to see acceptable codes for this field.*


File Process Tools Help
Global
App Express
Packaging
Direct Loan
OK
Add
Save
Retrieve
OK
Cancel
Help
For Help, press F1
NUM

Title: READY TO BE PACKAGED

PREDEFINED QUERY

Field: PACKAGING STATUS

Operator: =

Value ☐ Prompt at Execution

EDExpress for Windows 1999 - 2000

Valid values are P = Packaged, R = Ready to Package, M = Manually Adjusted Package N = Not Ready to Package, U = Unpackaged and H = Handpackaged

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C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\EXPRESS90.MDB

The code for Ready to Package is ***R****.*

Click ***OK***

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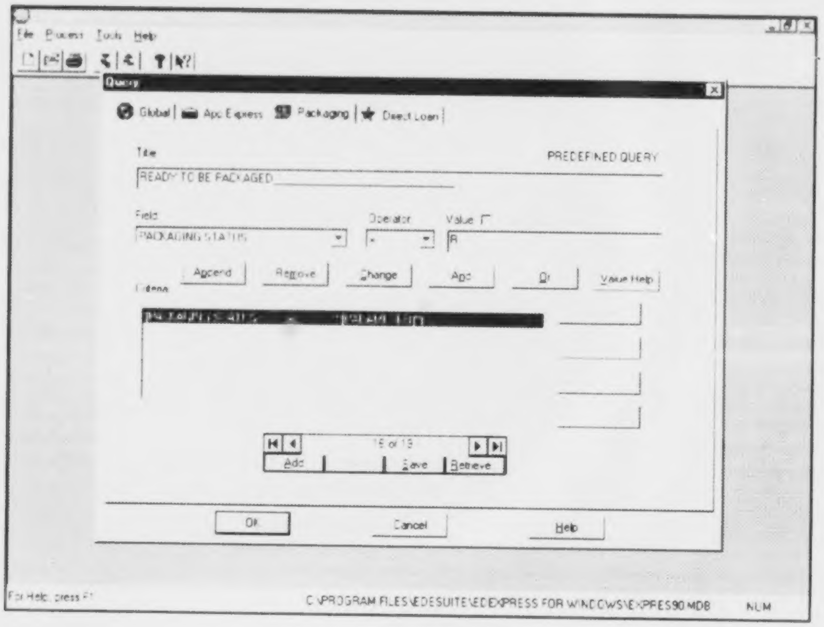
*Enter **R** in the value field*

*Click **Change***

*Click **Save** to save the new query*



Title: READY TO BE PACKAGED

Field: PACKAGING STATUS

Operator: =

Value: R

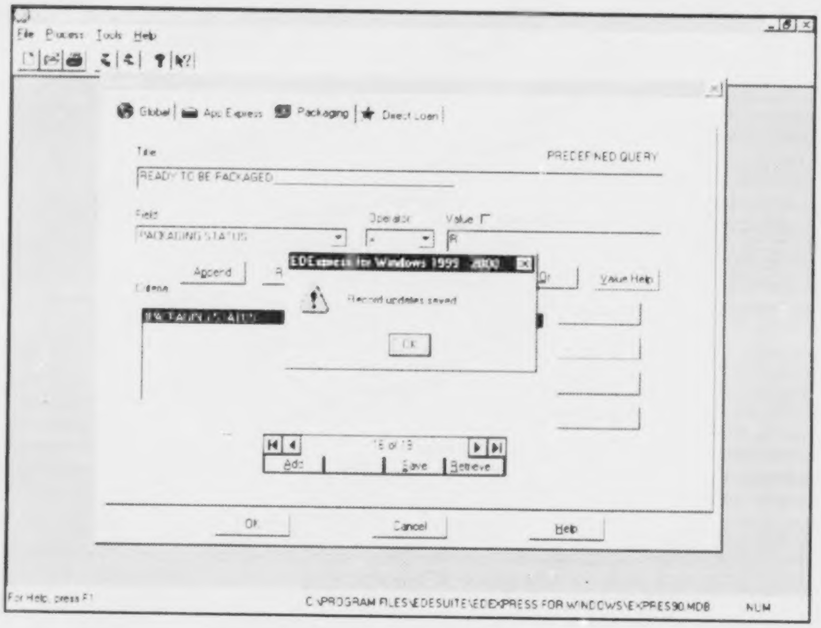
15 of 19

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\EXPRES90.MDB

File Process Tools Help
Query
Global
App Express
Packaging
Direct Loan
PREDEFINED QUERY
Append
Remove
Change
And
Or
Value Help
Criteria
Add
Save
Retrieve
OK
Cancel
Help
NUM

*Click **OK***



EDExpress for Windows 1999 - 2000

Record updates saved

Title: READY TO BE PACKAGED

Field: PACKAGING STATUS

Operator: =

Value: R

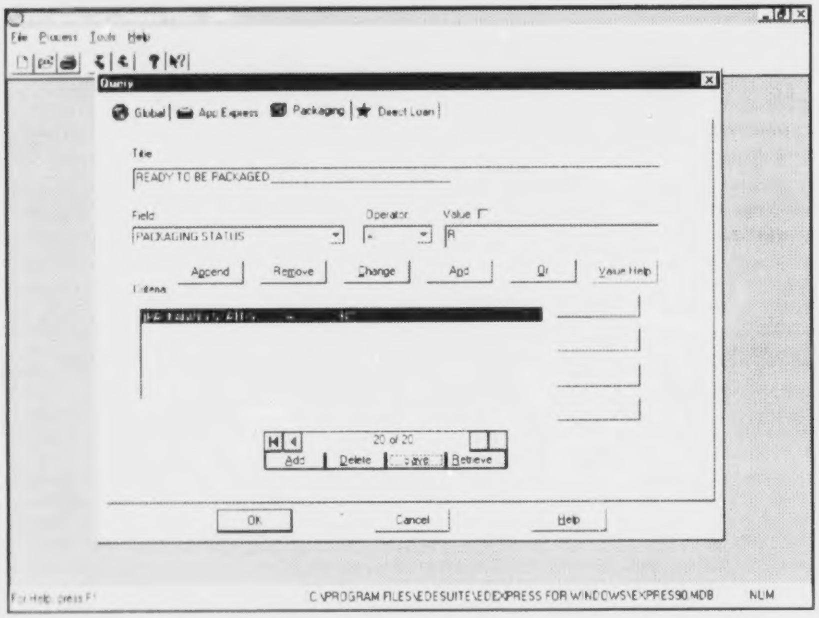
15 of 19

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\EXPRES90.MDB

File Process Tools Help
Global
App Express
Packaging
Direct Loan
PREDEFINED QUERY
Append
Or
Value Help
Criteria
OK
Add
Save
Retrieve
OK
Cancel
Help
NUM

BEST COPY AVAILABLE


File Process Tools Help
Query
Global
App Express
Packaging
Direct Loan
Append
Remove
Change
And
Or
Value Help
Add
Delete
Save
Retrieve
OK
Cancel
Help
For Help, press F1
NUM

Title: READY TO BE PACKAGED

Field: PACKAGING STATUS

Operator: =

Value: R

Criteria: PACKAGING STATUS = "R"

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The new query is displayed and has been added to the database.

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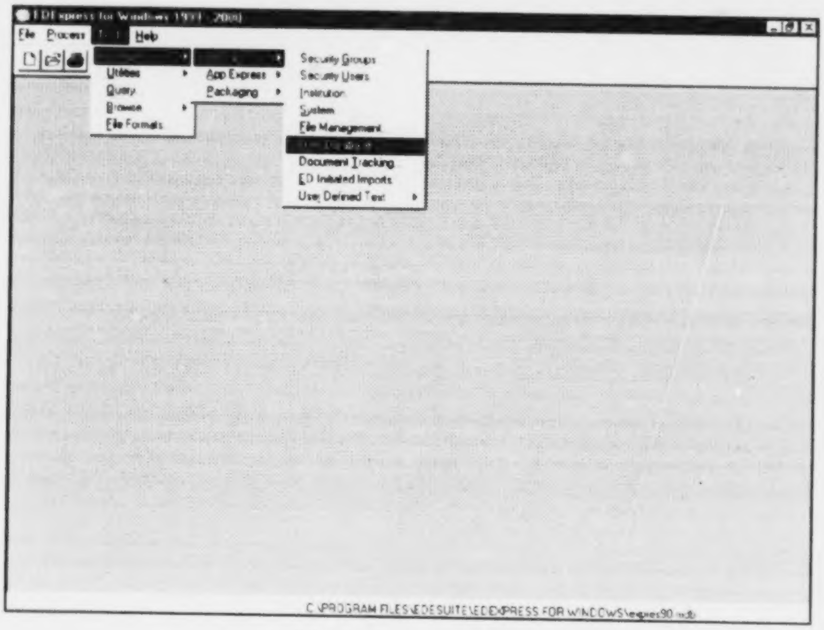
User-Defined Fields

In addition to the standard fields, users can develop user-defined fields to be added to the Query database. These fields may be needed to provide additional information about the student not included in the ISIR data.

In creating user-defined fields, you should anticipate all of your school's possible data items for the upcoming cycle. You can add new fields to the database, and you can increase the field length without affecting present data.

Click **Tools/Setup/ Global/User Database**


EDExpress for Windows 1999 - 2000
File
Process
Tools
Help
Utilities
Query
Browse
File Formats
App Express
Packaging
Security Groups
Security Users
Institution
System
File Management
User Database
Document Tracking
ED Initiated Imports
User Defined Text
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Note:

If you change the field label, data entered for that field will be lost.

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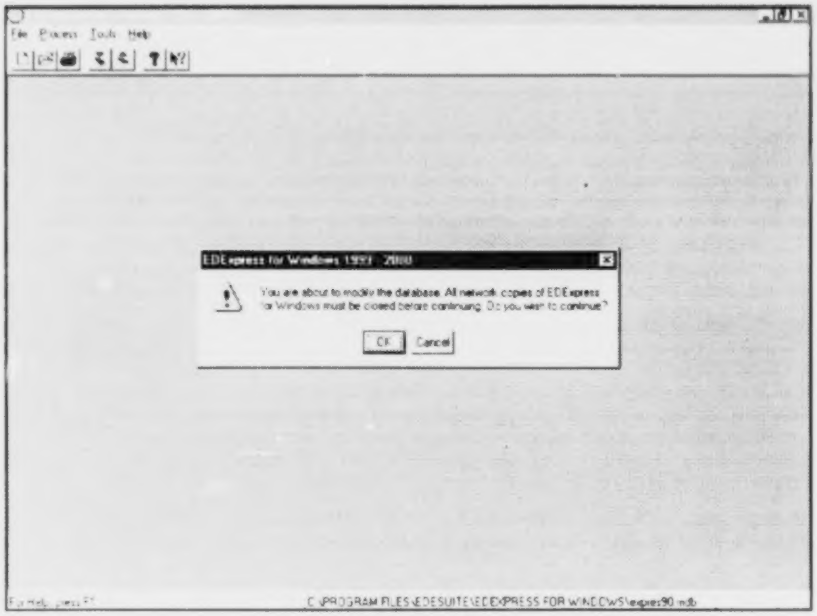


EDExpress for Windows 1999 - 2000

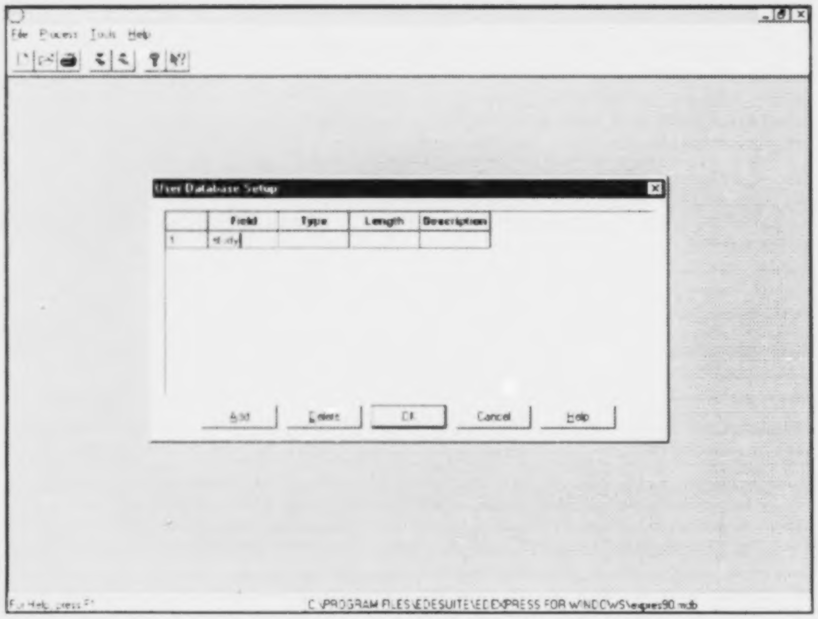
You are about to modify the database. All network copies of EDExpress for Windows must be closed before continuing. Do you wish to continue?

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

When you access the User Database, a warning appears cautioning you that you will be modifying the database.

Click ***OK*** *to continue.*



User Database Setup

	Field	Type	Length	Description
1	Study			

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Type a descriptive free-form field name up to 20 characters. The field name should be a short one-word description that you will recognize later.

In this example, we will enter a field for course of study. The field name will be ***Study****.*

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Press the right arrow key or click the type field.

A user field must be designated as one of four types:

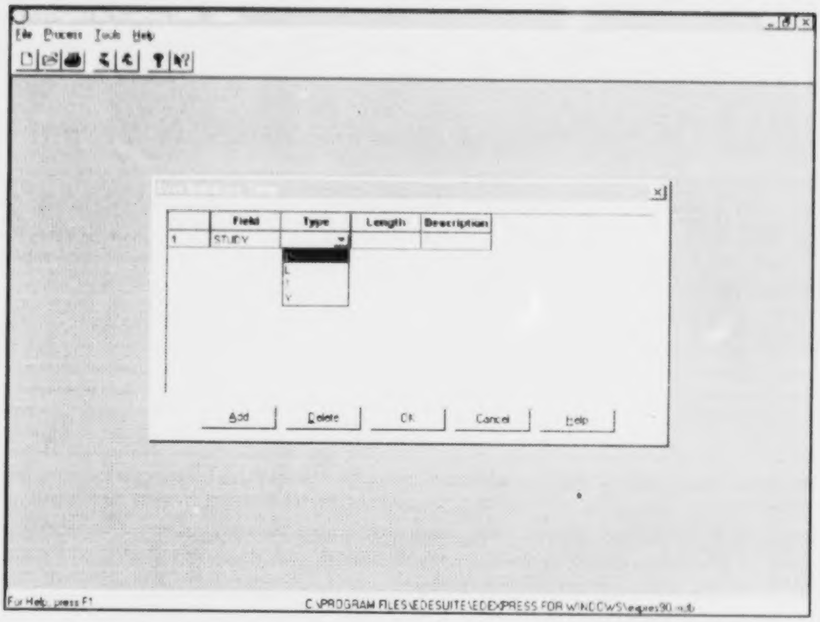
***D** for a date field.*

***L** for a numeric field.*

***T** for a text field.*

***Y** for a yes/no field.*

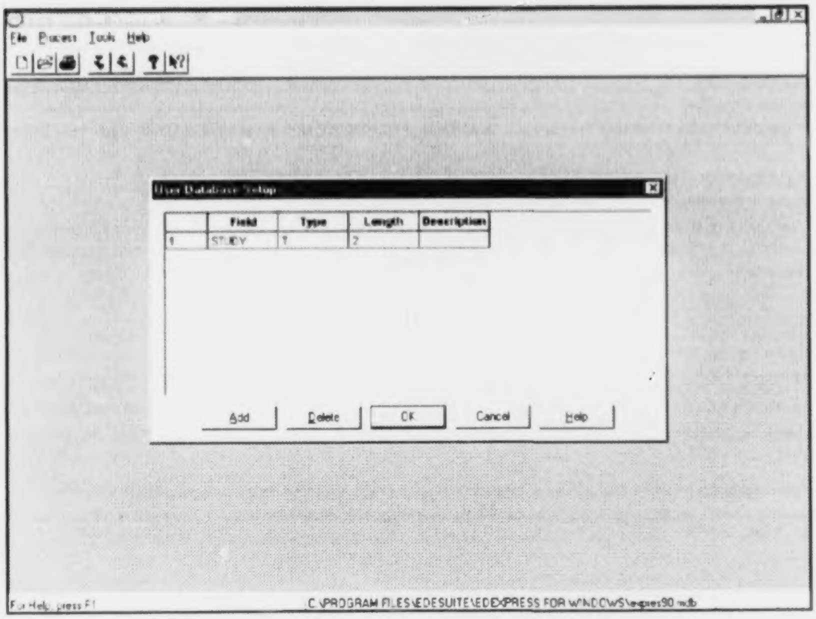
*To use a combination of letters and numbers, we select the value **T**.*


File Process Tools Help
L
T
Y
Add
Delete
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

	Field	Type	Length	Description
1	STUDY			

Tip:

The value of "T" can be used for alphanumeric combinations.


File Process Tools Help
User Database Setup
Add
Delete
OK
Cancel
Help
For Help, press F1

	Field	Type	Length	Description
1	STUDY	T	2	

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Press the right arrow or click the ***Length*** *field.*

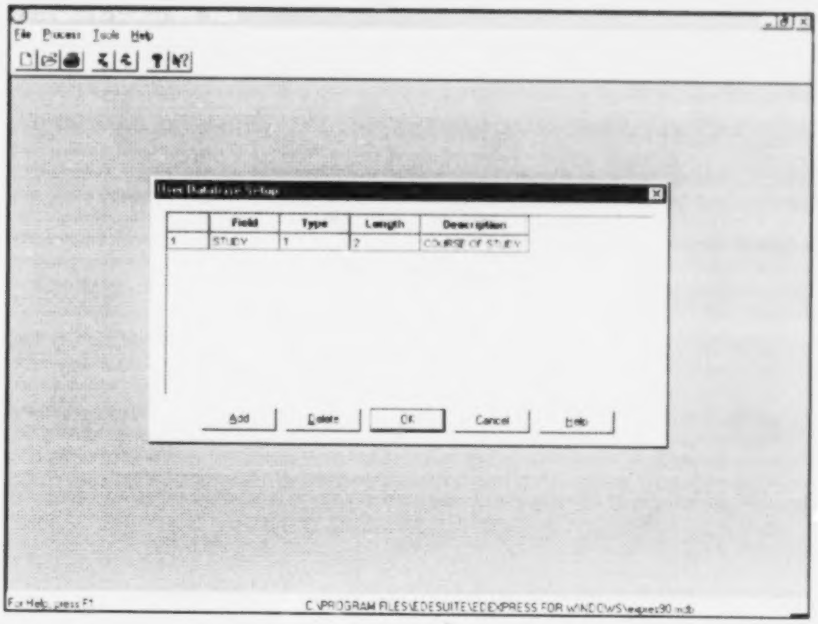
Note:

Type the data length for the field depending on the data type you selected. The following are the maximum field lengths:

Field Type	*Maximum number of characters*
T - Text	*40*
L - Numeric	*16*
D - Date	*8 (only allowable entry)*
Y - Yes/No	*1*

*Enter **Course of Study** in the description field.*

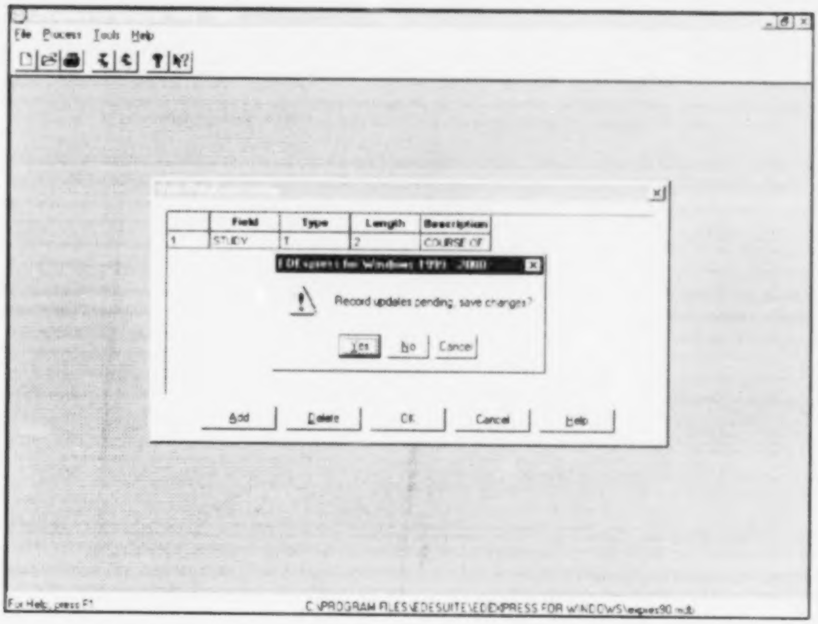
*Click **OK** to save.*



File
Process
Tools
Help
User Database Setup
Add
Delete
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

	Field	Type	Length	Description
1	STUDY	1	2	COURSE OF STUDY

*Click **Yes** to save the changes.*



File
Process
Tools
Help
EDExpress for Windows 1999 - 2000
Yes
No
Cancel
Add
Delete
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

	Field	Type	Length	Description
1	STUDY	1	2	COURSE OF

Record updates pending, save changes?

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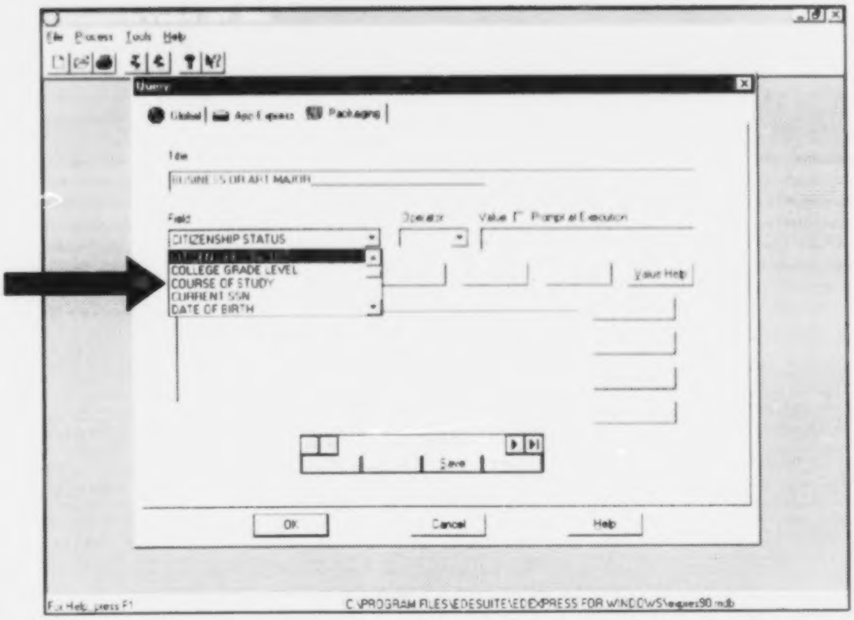
Using a User Defined Field in a Query



Title: BUSINESS OR ART MAJOR

Field: CITIZENSHIP STATUS

Value ☐ Prompt at Execution

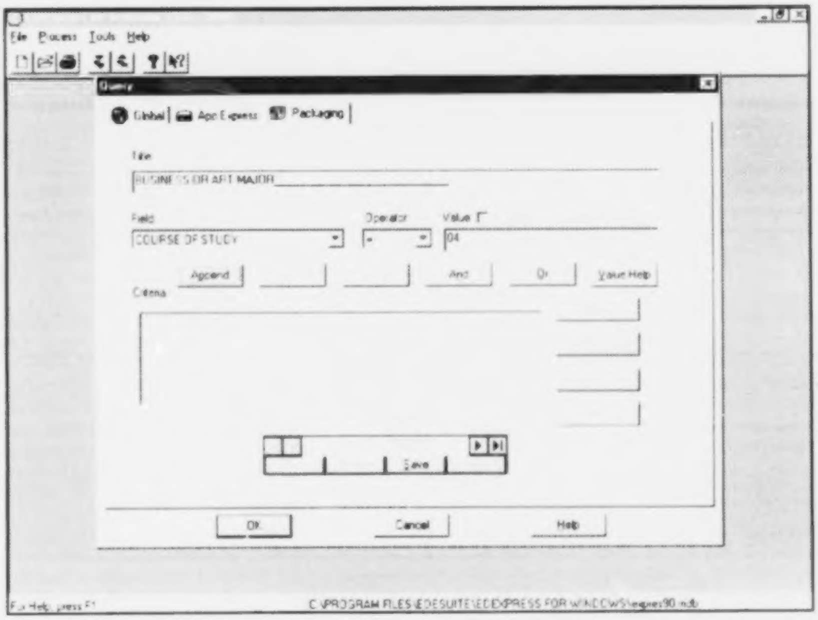
COLLEGE GRADE LEVEL
COURSE OF STUDY
CURRENT SSN
DATE OF BIRTH

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

File Process Tools Help
Query
Global
App Express
Packaging
Operator
Value Help
Save
OK
Cancel
Help
For Help, press F1

The User Defined field is now available to be used in a query.

When you create a new query you see the user defined field you created in the list of available fields.



Title: BUSINESS OR ART MAJOR

Field: COURSE OF STUDY

Operator: =

Value ☐ 04

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

File Process Tools Help
Query
Global
App Express
Packaging
Append
And
Or
Value Help
Criteria
Save
OK
Cancel
Help
For Help, press F1

The user defined field labels appear.

So far, the query statement will select records with a course of study equal to Business (04).

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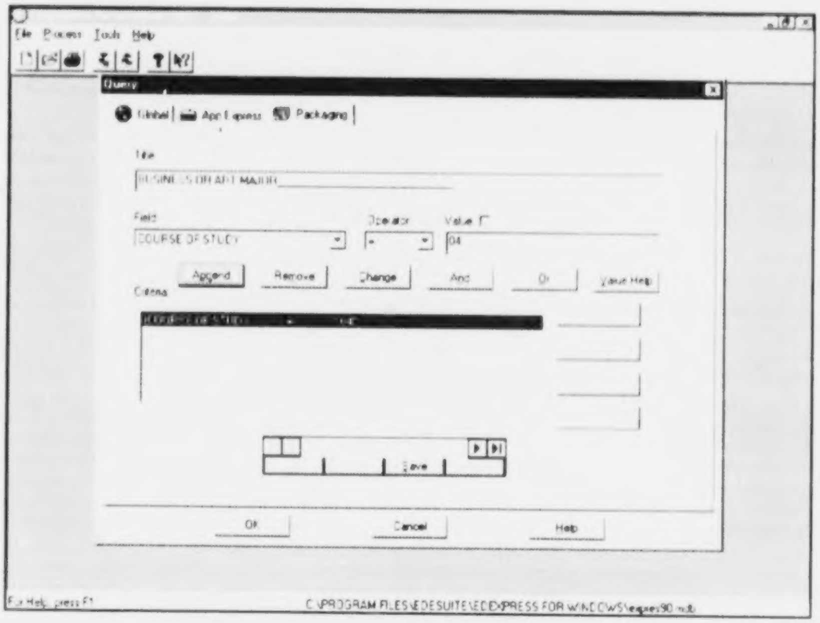
Click **Append** to add the statement to the query


File Process Tools Help
Query
Global
App Express
Packaging
Append
Remove
Change
And
Or
Value Help
Save
OK
Cancel
Help

Title: BUSINESS OR ART MAJOR

Field: COURSE OF STUDY

Operator: =

Value: 04

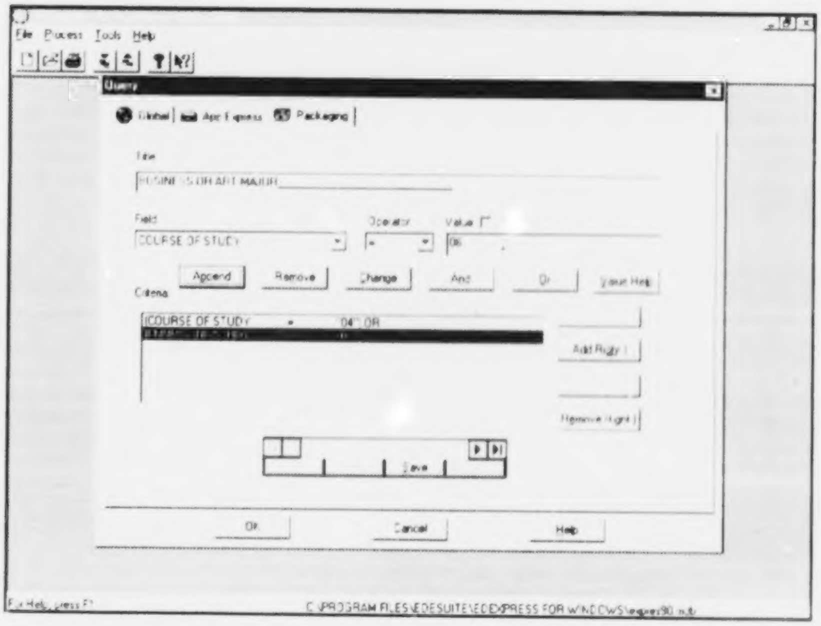
Criteria: (COURSE OF STUDY = "04"

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Now we will add the second portion of the statement

Click **OR**, change the value to **06** (Art majors) and click **Append** to complete the query. This is a completed query that includes a user field


File Process Tools Help
Query
Global
App Express
Packaging
Append
Remove
Change
And
Or
Value Help
Add Right)
Remove Right)
Save
OK
Cancel
Help

Title: BUSINESS OR ART MAJOR

Field: COURSE OF STUDY

Operator: =

Value: 06

Criteria:

(COURSE OF STUDY = "04" OR

COURSE OF STUDY = "06"

For Help, press F1

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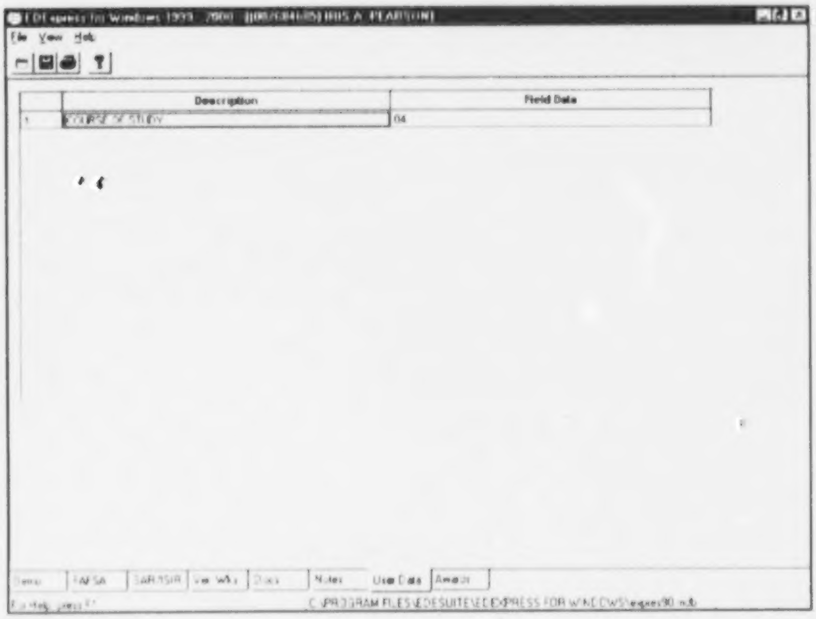

File View Help
FAFSA
SAR/ISIR
Notes
User Data
Award
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

	Description	Field Data
1	COURSE OF STUDY	04

You can use the User Data tab in an open student record to enter data for the user-defined fields you created

Data may be entered at any time. If a query used to create a packaging record includes a User-Defined field, it must be populated to be of use

Apply What You Know

Now you are ready to create some queries.

Use the worksheets in this chapter to record your query information. When you have completed the worksheets, create the queries following the steps listed at the bottom of this page. In the exercises, you formulate queries for the following groups:

- Dependent students, living at home, residing in VA or MD
- Independent students living on campus
- Students interested in work-study
- Students interested in student loans
- Dependents selected for verification or applying for institutional aid
- Independent students selected for verification

To create a query, follow these steps.

1. Select **Tools/Query** from the EDExpress menu bar.
2. Click the **Add** button.
3. Type a descriptive title for the query.
4. Select a field from the Field list. You can type the first few letters of the field name to find the field names that begin with those letters.
5. Click the **down arrow** in the Operator field to select an operator.
6. Type a value for the field. Click the **Value Help** button to see the valid values for the field.

   If you want to be prompted for a value at the time you use the query, don't specify a value for the query statement. Instead, click the **Prompt at Execution** checkbox.
7. Click the **Append** button to add the query statement to the Criteria box.
8. (optional) Click the **AND** button or the **OR** button to add another statement to the query. Repeat steps 4 through 7 until you've added all statements for the query, then continue with step 9.
9. Click **Save** to save the query, then click **OK**.
10. Click **OK** to close the Query dialog box or click **Add** to create another query.

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Query Worksheet

In the space below, describe the group of students to be selected

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

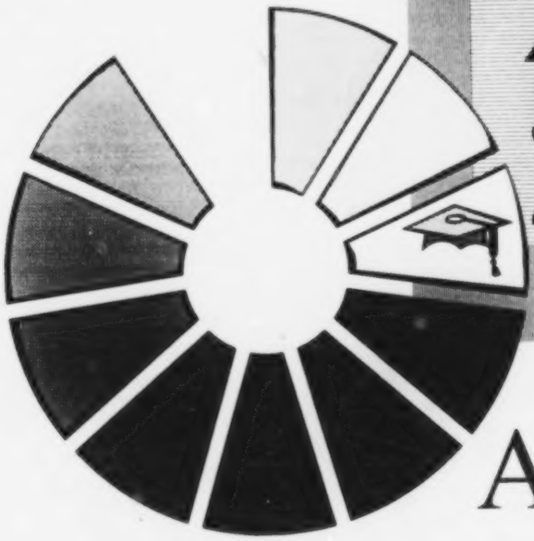
And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Discussion Questions for Chapter 2

1. Why do you need a query?
2. What are some uses for queries?
3. What are the basic elements of a query?
4. Can you use AND and OR in the same query? If so, how?
5. How can you identify students who are eligible for a Pell Grant?

Chapter 3



Academic Year, System Setup and SAP

At your school you have already defined your academic year:

- Comprised of semesters, quarters, trimesters, clock hours
- The number of terms
- Comprised of semesters, quarters, trimesters, clock hours
- Length of each term

You have also probably decided how to allocate aid dollars across these terms:

- Equal distribution
- Greater percentage in some

Now you must take this information and define your academic year(s) in the software. In addition, you must define other functions such as print assignment and codes to use for satisfactory academic progress.

3

Academic Year, System Setup & SAP

Objectives

1. Define the components of your academic year:
    - Number of terms
    - Pell formula
    - Fund allocation
2. Create an academic year profile record.
3. Determine global packaging system settings.
4. Establish codes for satisfactory academic progress.

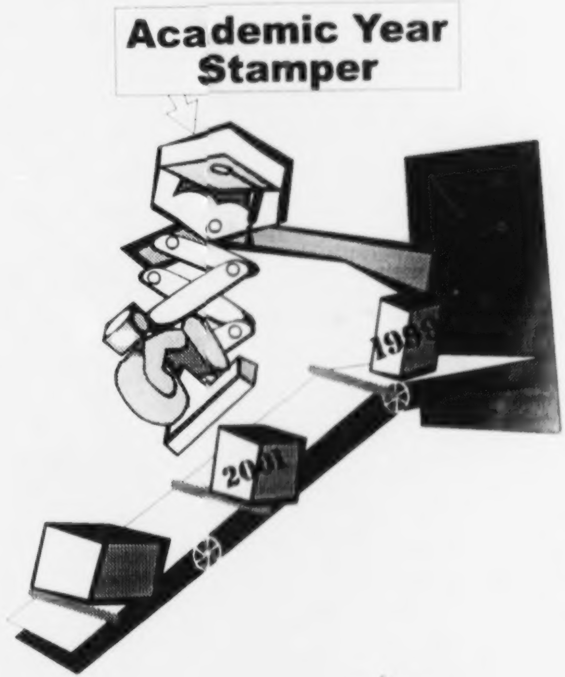
Academic Year Profile Setup

In the Academic Year Profile (AYP) dialog box you establish your school's academic year. For each profile you create, you can:

- Specify up to five terms that your institution uses in the packaging process.
- Indicate a default enrollment status for each term.
- Establish your Federal Pell Grant formula and percentages of full year awards.
- Define an academic year profile code and title for each profile.
- Set the EFC program length to import from the ISIR database.
- Specify the allocation percentage of fund types for each term.

Why Create an Academic Year Profile?

Each student packaging record you create will have an Academic Year Profile (AYP). Each time you use the Import function to create packaging records you identify which AYP to use. When you are ready to package your students, the distribution terms defined in the AYP are used to determine how the funds awarded (including Pell) are to be allocated for each term.



Academic Year Profile Worksheet

SAMPLE

Establish a code to identify this Academic Year (up to 4-characters, can be alphanumeric).	**FS**
Is this Academic Year the default Academic Year?	Yes ☒ No ☐
What is your campus title for this Academic Year? (Free-form)	*Full Year*

Enter Pell Formula

1. ☒	**Standard Term 30 weeks. (Formula 1)** (Additional Pell Percentage information is not required.)
2. ☐	**Standard Term less than 30 weeks. (Formula 2)** (Provide a Pell Percentage in Pell Proration field.)
3. ☐	**Any Term-based credit hour program. (Formula 3)** (Provide a Pell Percentage in Pell % per term boxes.)
4. ☐	**Clock Hour and Credit Hour without terms. (Formula 4)** (Provide a Pell Percentage in Pell Proration field.)
5. ☐	**Correspondence Study - Award based on half-time payment schedule. (Formula 5)** (Provide a Pell Percentage in Pell Proration field.)
6. ☐	**Correspondence Study - Award based on less than half-time payment schedule. (Formula 6)** (Provide a Pell Percentage in Pell Proration field.)

If this is a Proration Academic Year, what is the Proration Percentage? ________% (00 to 99)

For calculating the EFC, what is the program length in months?

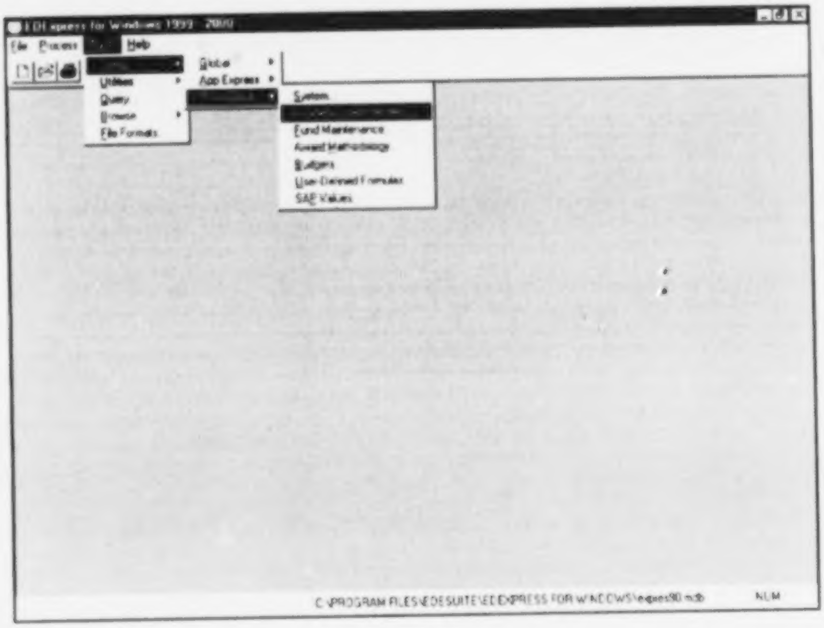
1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☒ 10 ☐ 11 ☐ 12 ☐

Term Breakdown

Term Name (Free form)	Default Enrollment Status (F,3/4, 1/2, <1/2, Fall 98 Winter 98, etc.)	Pell % for term	Grant % for term	Perkins % for term	FWS % for term	Loan % for term
Fall	*Full time*	*Auto*	*50*	*50*	*50*	*50*
Spring	*Full time*	*Auto*	*50*	*50*	*50*	*50*

Creating an Academic Year Profile Record

Now that you have completed your Academic Year Profile worksheet, you are ready to enter the information into the software.


EDExpress for Windows 1999 - 2000
File
Process
Help
Global
App Express
Utilities
Query
Browse
File Formats
System
Fund Maintenance
Award Methodology
Budgets
User-Defined Formulas
SAP Values
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

*Select **Tools/Setup/Packaging/Academic Year Profile** from the menu bar.*

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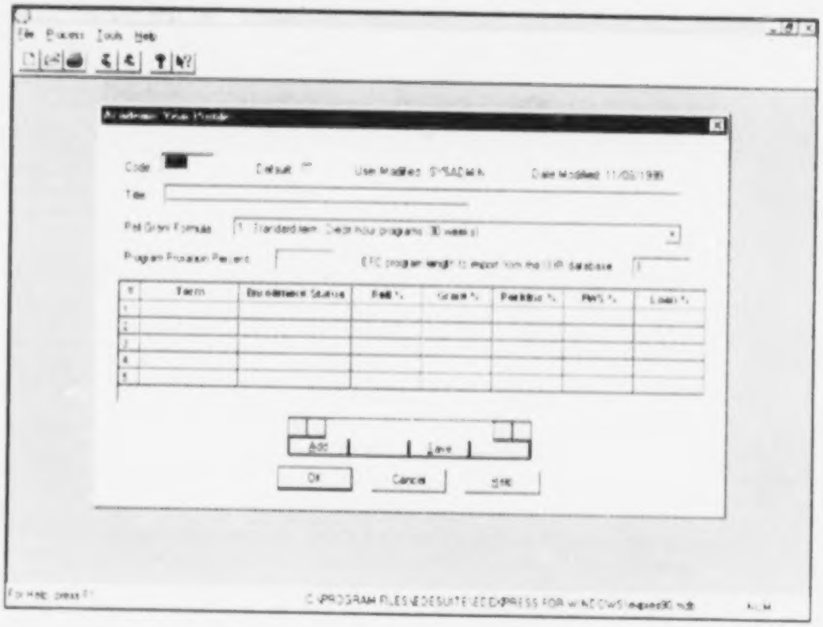
In this example, we create an AYP using a Pell Formula 1 (standard term or at least 30 weeks). Examples of other formula types are provided at the end of this section.

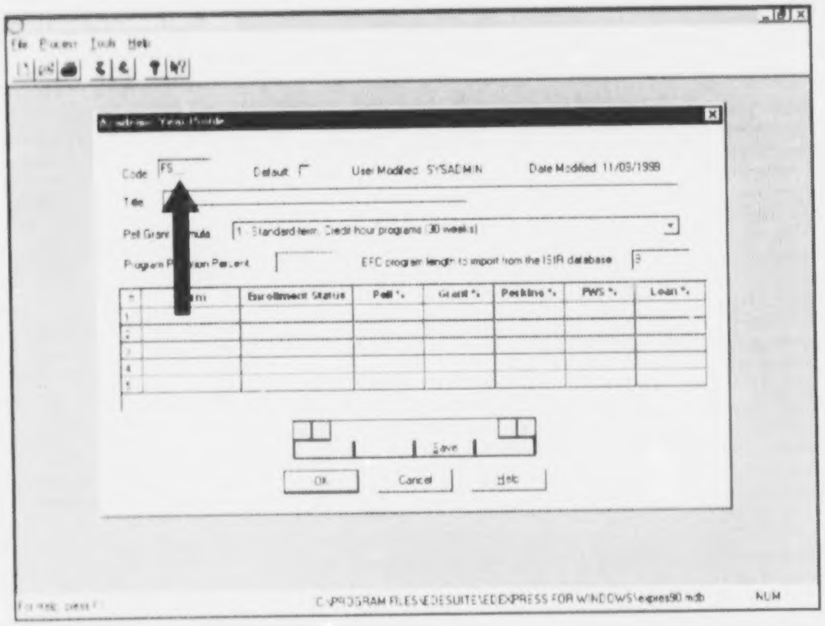
The Academic Year Profile box is displayed.

*If this is the first AYP record, begin entering information. Otherwise, click on **Add** to create a new record.*


File
Process
Tools
Help
Academic Year Profile
Code
Default
User Modified
Date Modified
Title
Pell Grant Formula
Program Proration Percent
Term
Enrollment Status
Pell %
Add
Save
OK
Cancel
Help
For Help, press F1

Tip:

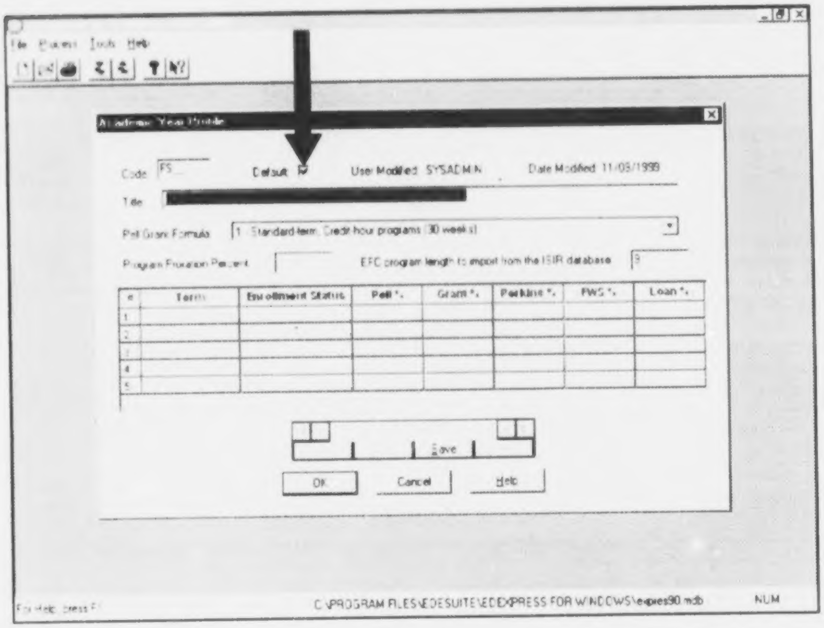
You may create as many AYP records as you need.



Code FS
Default ☐
User Modified SYSADMIN
Date Modified 11/03/1998
Pell Grant Formula 1 - Standard term, Credit hour programs (30 weeks)
EFC program length to import from the ISIR database 9

File Process Tools Help
Academic Year Profile
Title
Program Proration Percent
# Term Enrollment Status Pell % Grant % Perkins % FWS % Loan %
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb
NUM

First, type the code to identify this record. In this example, FS is for Fall/ Spring.



Code FS
Default ☑
User Modified SYSADMIN
Date Modified 11/03/1998
Pell Grant Formula 1 - Standard term, Credit hour programs (30 weeks)
EFC program length to import from the ISIR database 9

File Process Tools Help
Academic Year Profile
Title
Program Proration Percent
# Term Enrollment Status Pell % Grant % Perkins % FWS % Loan %
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb
NUM

Next, decide if this record will be the Default Academic Year. Choose your most common AYP for this designation.

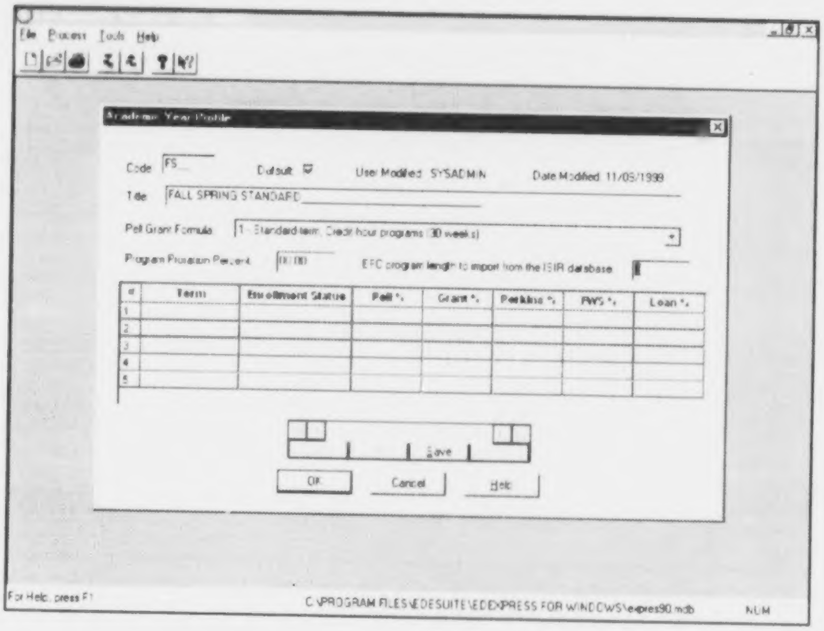
*Click the Default **check box**.*

Type a title

Select the appropriate ***Pell Grant Formula*** *type*

If the formula type is 2, 4, or 5, you must type the program proration percent 0-99.

Set the number of months for the EFC. When you use an ISIR to create a packaging record, the software will use this month's value to calculate the student's EFC. The default is nine months.

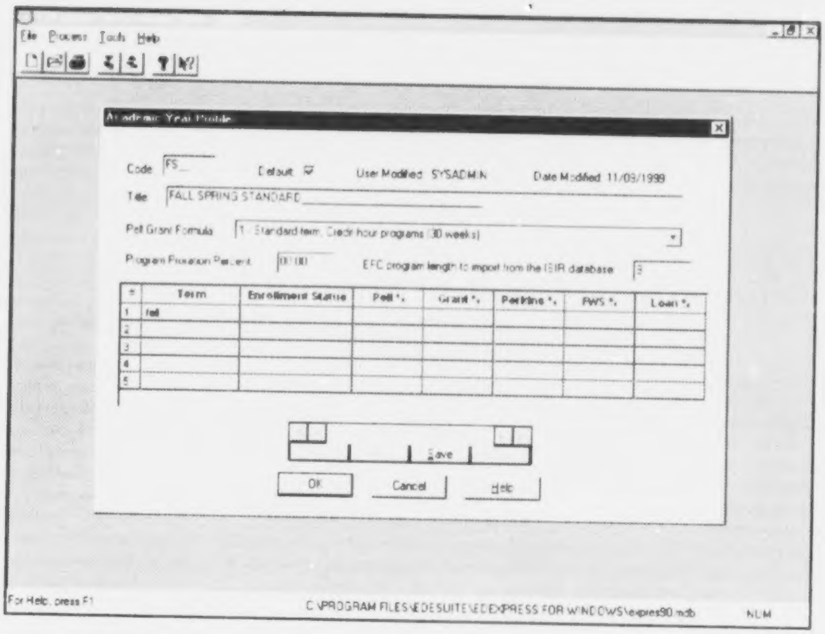

File Process Tools Help
Academic Year Profile
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code FS
Default ☑
User Modified SYSADMIN
Date Modified 11/05/1999
Title FALL SPRING STANDARD
Pell Grant Formula 1 - Standard term, Credit hour programs (30 weeks)
Program Proration Percent 00.00
EFC program length to import from the ISIR database

#	Term	Enrollment Status	Pell %	Grant %	Perkins %	FWS %	Loan %
1							
2							
3							
4							
5							

Next, create your terms. The name of each can be any alphanumeric combination.

In this example, we will create two terms, beginning with Fall.


File Process Tools Help
Academic Year Profile
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code FS
Default ☑
User Modified SYSADMIN
Date Modified 11/03/1999
Title FALL SPRING STANDARD
Pell Grant Formula 1 - Standard term, Credit hour programs (30 weeks)
Program Proration Percent 00.00
EFC program length to import from the ISIR database 9

#	Term	Enrollment Status	Pell %	Grant %	Perkins %	FWS %	Loan %
1	fall						
2							
3							
4							
5							

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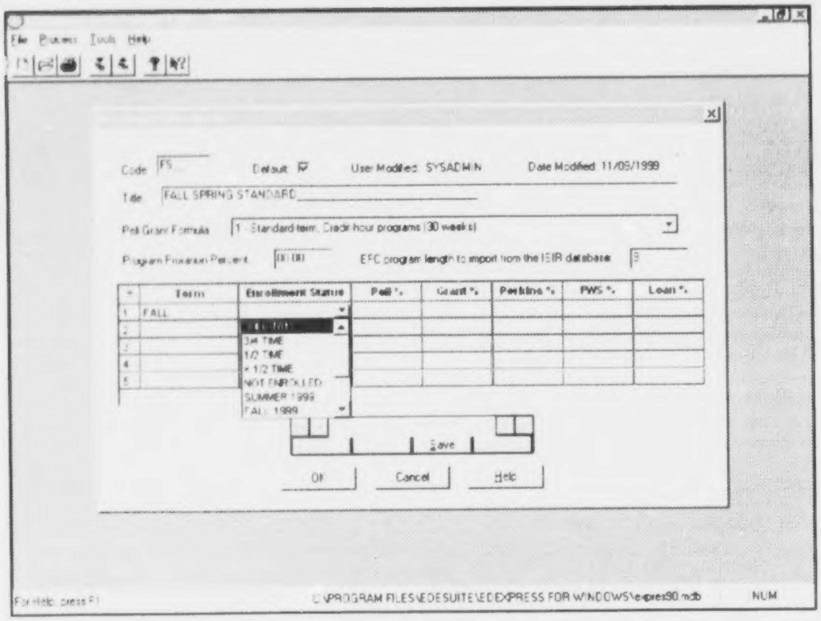

Code FS Default ☑ User Modified: SYSADMIN Date Modified 11/09/1998

Title FALL SPRING STANDARD

Pell Grant Formula 1 - Standard term, Credit hour programs (30 weeks)

Program Proration Percent 00.00 EFC program length to import from the ISIR database 9

#	Term	Enrollment Status	Pell %	Grant %	Perkins %	FWS %	Loan %
1	FALL						
2							
3							
4							
5							

- [illegible]
- 3/4 TIME
- 1/2 TIME
- < 1/2 TIME
- NOT ENROLLED
- SUMMER 1999
- FALL 1999

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For each term, define the default enrollment status. When packaging, this field is used to accurately calculate the Pell amount.

The enrollment status can be a set status, such as full-time or a value floated in from any enrollment field of the ISIR.

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Which Value to Use for Enrollment Status

Method 1

If you select one of the following entries, each packaging record you create using this profile will have the same enrollment status for that term, regardless of the student's responses to the enrollment status questions on the FAFSA:

- Full time
- 3/4 time
- 1/2 time
- < 1/2 time (less than 1/2 time)
- Not Enrolled

Example: You assign an enrollment status of Full time for Term 1 in this academic year profile. Now, every packaging record you create with this profile will show full-time enrollment status for Term 1.

Method 2

If you select one of the following entries, EDExpress does not use a default value and instead takes the student's enrollment status response (on the FAFSA) from the ISIR during the import process:

- Summer 1999
- Fall 1999
- Winter 1999-2000
- Spring 2000
- Summer 2000

Example: You assign Fall 1999 as the enrollment status for Term 1 in this academic year profile. Now, during the import process, EDExpress takes the enrollment status the student indicated for Fall 1999 (on the FAFSA) from the ISIR and assigns that value as the student's intended enrollment status on the packaging record.

What Happens When I Use Method 2?

Award Process

If you assign an AYP based on varying values for each term, the Pell Grant will be awarded based on the appropriate table (Full time, 3/4 time, etc.). Other funds are not allocated differently unless assigned based on some criteria (i.e., student must be enrolled 1/2 time).

Budgets

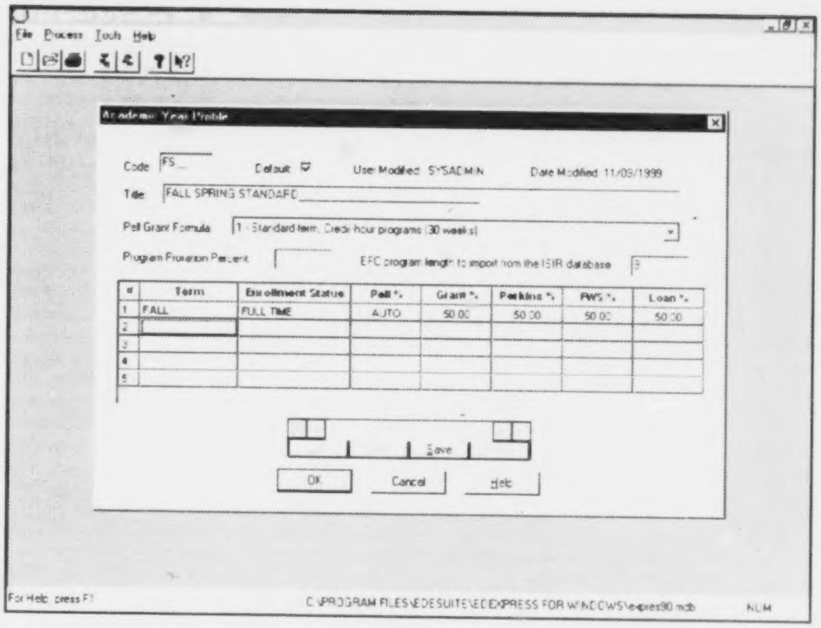
Packaging in EDExpress does not automatically adjust budgets for different enrollment statuses. You have two options to adjust the budget amount:

- Create a separate budget using modified amounts and assign them based on an enrollment status criteria.
- Print a list of packaging records using enrollment status as your selection criteria. Use multiple entry or manually adjust the budgets on each record.

For each of the five types of funds, set the percentage of that fund to be allocated for each term.

The Pell percentage may be added only if the Pell Grant formula selected is 3, 4, 5, or 6.

For all other formulas, Pell is allocated evenly across the number of terms defined.


File Process Tools Help
Academic Year Profile
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code: FS

Default: ☑

User Modified: SYSADMIN

Date Modified: 11/09/1999

Title: FALL SPRING STANDARD

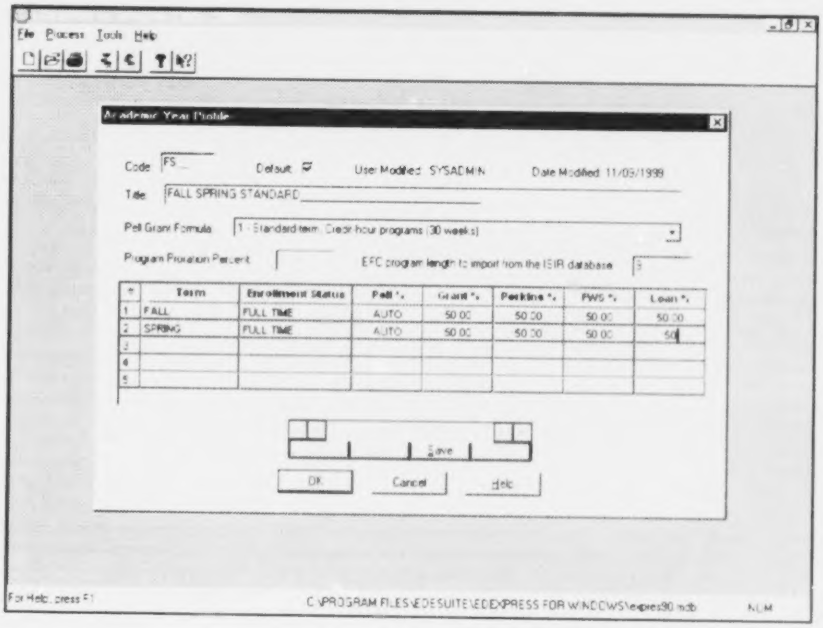
Pell Grant Formula: 1 - Standard term, Credit-hour programs (30 weeks)

Program Proration Percent:

EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	Grant %	Perkins %	FWS %	Loan %
1	FALL	FULL TIME	AUTO	50.00	50.00	50.00	50.00
2							
3							
4							
5							

In this example, the funds are distributed equally between each of the two terms.


File Process Tools Help
Academic Year Profile
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code: FS

Default: ☑

User Modified: SYSADMIN

Date Modified: 11/09/1999

Title: FALL SPRING STANDARD

Pell Grant Formula: 1 - Standard term, Credit-hour programs (30 weeks)

Program Proration Percent:

EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	Grant %	Perkins %	FWS %	Loan %
1	FALL	FULL TIME	AUTO	50.00	50.00	50.00	50.00
2	SPRING	FULL TIME	AUTO	50.00	50.00	50.00	50
3							
4							
5							

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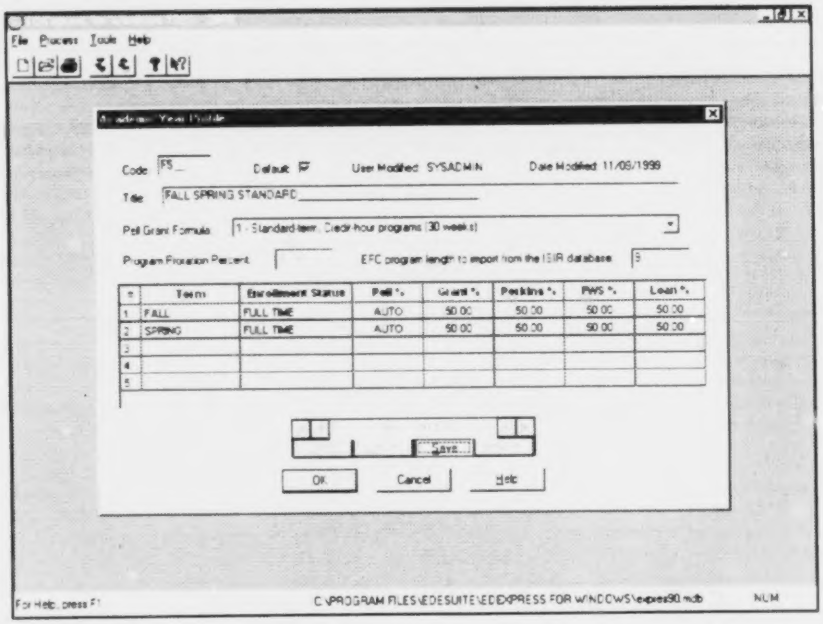
File Process Tools Help
Academic Year Profile
Save
OK
Cancel
Help
For Help, press F1
NUM

Code: FS
Default: ☑
User Modified: SYSADMIN
Date Modified: 11/09/1999
Title: FALL SPRING STANDARD
Pell Grant Formula: 1 - Standard-term, Credit-hour programs (30 weeks)
Program Proration Percent:
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	Grant %	Perkins %	FWS %	Loan %
1	FALL	FULL TIME	AUTO	50.00	50.00	50.00	50.00
2	SPRING	FULL TIME	AUTO	50.00	50.00	50.00	50.00
3							
4							
5							

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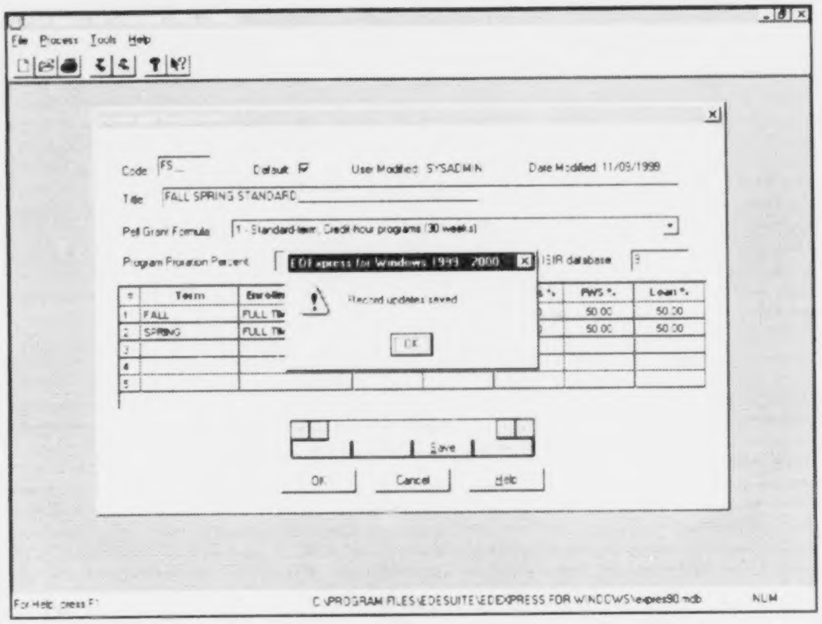
When you have completed your entry, select **Save**.


File Process Tools Help
EDExpress for Windows 1999 - 2000
OK
Save
OK
Cancel
Help
For Help, press F1
NUM

Record updates saved

Code: FS
Default: ☑
User Modified: SYSADMIN
Date Modified: 11/09/1999
Title: FALL SPRING STANDARD
Pell Grant Formula: 1 - Standard-term, Credit-hour programs (30 weeks)
Program Proration Percent:
ISIR database: 9

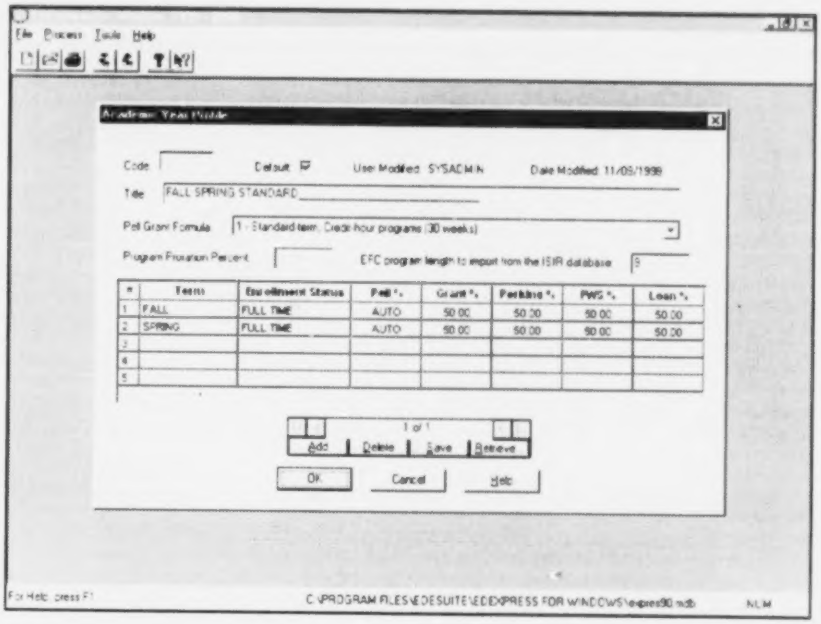
#	Term	Enrollm	FWS %	Loan %
1	FALL	FULL TI	50.00	50.00
2	SPRING	FULL TI	50.00	50.00
3				
4				
5				

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Click **OK** to continue.

Pell Formula 1

This is a completed Academic Year Profile record for a standard term school with two semesters. The Pell Grant is calculated based on Pell Formula 1 with equal allocation of funds for each term and an assumption of full-time enrollment for all students.


File Process Tools Help
Academic Year Profile
1 of 1
Add
Delete
Save
Retrieve
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

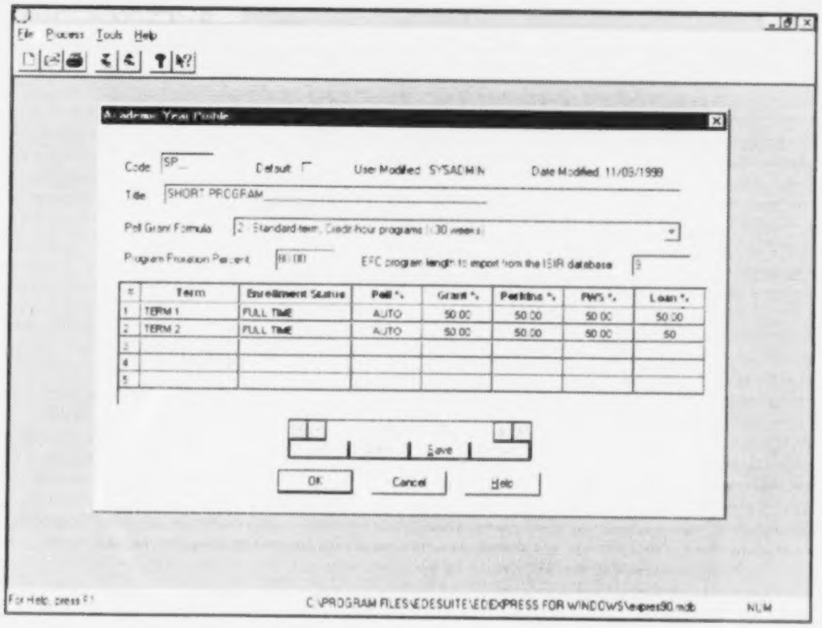
Code
Default ☑
User Modified SYSADMIN
Date Modified 11/05/1998
Title FALL SPRING STANDARD
Pell Grant Formula 1 - Standard term, Credit hour programs (30 weeks)
Program Proration Percent
EFC program length to import from the ISIR database 9

#	Term	Enrollment Status	Pell %	Grant %	Perkins %	FWS %	Loan %
1	FALL	FULL TIME	AUTO	50.00	50.00	50.00	50.00
2	SPRING	FULL TIME	AUTO	50.00	50.00	50.00	50.00
3							
4							
5							

Pell Formula 2

This record is for an academic year of less than 30 weeks.

This program is 24 weeks in length. Therefore, the Pell proration is 24 weeks/30 weeks=80.00%


File Process Tools Help
Academic Year Profile
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code SP
Default ☐
User Modified SYSADMIN
Date Modified 11/03/1998
Title SHORT PROGRAM
Pell Grant Formula 2 - Standard term, Credit hour programs (<30 weeks)
Program Proration Percent 80.00
EFC program length to import from the ISIR database 9

#	Term	Enrollment Status	Pell %	Grant %	Perkins %	FWS %	Loan %
1	TERM 1	FULL TIME	AUTO	50.00	50.00	50.00	50.00
2	TERM 2	FULL TIME	AUTO	50.00	50.00	50.00	50
3							
4							
5							

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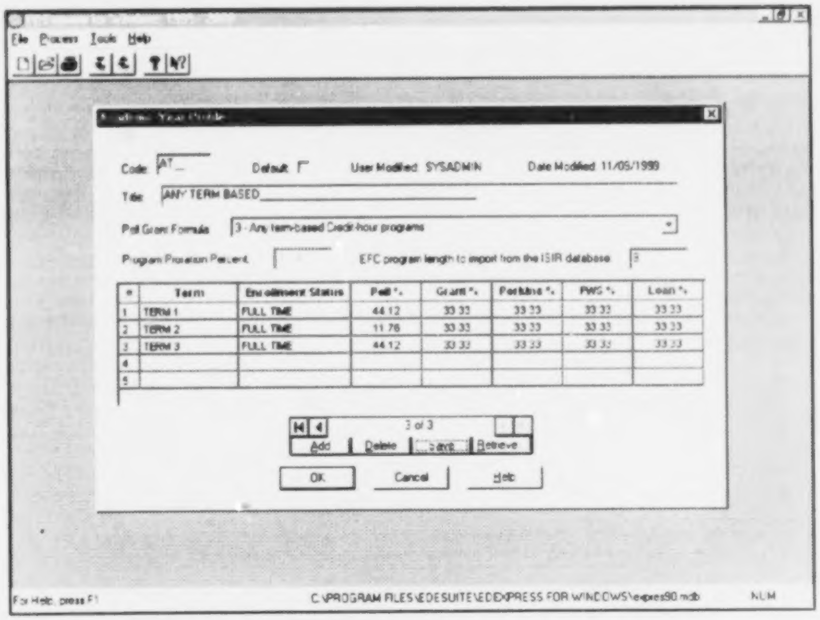
Pell Formula 3 or 6


File Process Tools Help
Academic Year Profile
Add
Delete
Save
Retrieve
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code: AT
Default: ☐
User Modified: SYSADMIN
Date Modified: 11/05/1999
Title: ANY TERM BASED
Pell Grant Formula: 3 - Any term-based Credit-hour programs
Program Proration Percent:
EFC program length to import from the ISIR database: 3

#	Term	Enrollment Status	Pell %	Grant %	Perkins %	FWS %	Loan %
1	TERM 1	FULL TIME	44.12	33.33	33.33	33.33	33.33
2	TERM 2	FULL TIME	11.76	33.33	33.33	33.33	33.33
3	TERM 3	FULL TIME	44.12	33.33	33.33	33.33	33.33
4							
5							

3 of 3

This record is for an academic year using any term-based year. The Pell Formula type used is 3. The setup would be similar for Formula 6.

The school considers a standard academic year to be 34 weeks.

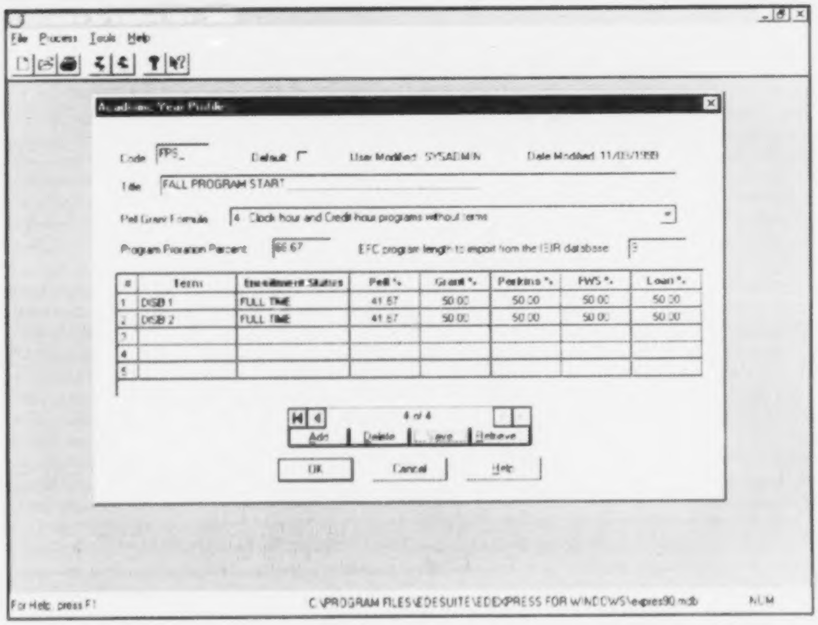
The amount of each term's Pell percent is calculated based on the number of weeks in each term.

Term 1
15 wks/34 wks=44.12%

Term2
4 wks/34 wks=11.76%

Term3
15 wks/34 wks=44.12%

Pell Formula 4 or 5


File Process Tools Help
Academic Year Profile
Add
Delete
Save
Retrieve
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code: FPS
Default: ☐
User Modified: SYSADMIN
Date Modified: 11/05/1999
Title: FALL PROGRAM START
Pell Grant Formula: 4 - Clock hour and Credit hour programs without terms
Program Proration Percent: 66.67
EFC program length to import from the ISIR database: 3

#	Term	Enrollment Status	Pell %	Grant %	Perkins %	FWS %	Loan %
1	DISB 1	FULL TIME	41.67	50.00	50.00	50.00	50.00
2	DISB 2	FULL TIME	41.67	50.00	50.00	50.00	50.00
3							
4							
5							

4 of 4

This record is for an academic year using clock hours. The Pell Formula type used is 4. (This setup would be similar for Formula 5.) In this example, the length of the term is 20 weeks and consists of 750 clock hours.

The school defines its standard academic year to be 30 weeks and 900 hours. Therefore, the Pell proration percentage entered is 20 weeks / 30 weeks = 66.67%.

The amount of each disbursement is calculated as 375 hours per term / 900 hours = 41.67%. This amount is entered in the Pell % column for each defined term.

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Pell Grant Formula

Your Pell Grant formula selection determines whether you need to complete the Program Proration Percent and Pell % fields. Use the following table to decide what fields to complete. An X means you must complete the field.

Pell Grant Formula	Program Proration Percent	Pell %
1—Standard term, credit hour programs (30 weeks)		
2—Standard term, credit hour programs (<30 weeks)	X	
3—Any term based credit hour programs		X
4—Clock hour and credit hour programs without terms	X	X
5—Correspondence Study - Award based on half-time payment schedule	X	X
6—Correspondence Study - Award based on less than half-time payment schedule		X

System Setup

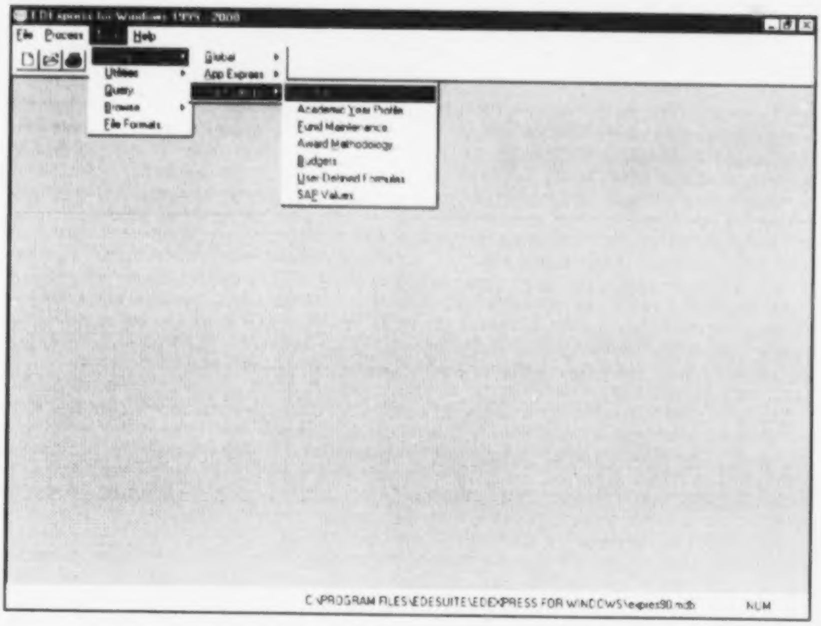
Use the Packaging System Setup to control global parameters for the following functions:

- **Total Number of Award Letters to be Printed per Student**Each time you print an award letter for a student, how many copies do you want to create? The default number is 2.
- **Maximum Number of Award Letters to be Sent per Student**. Do you want to limit the number of times you send award letters to the student? The default number is 5.
- **Award Letter Type**. Do you want to send an offer letter (O) or a notification letter (N)?
- **Allow Imported Pell EFC to be Modified**. Will you need to update the EFC manually after the record is imported?
- **Packaging Results Status**. Do you want to set the default result status (O-Offered, A-Accepted) per fund when students are packaged?
- **Priority Deadline Date Type**. Do you want to set a priority deadline date when indexing for packaging process and reports?
- **User-Defined Date Name**. Do you want to select a date in the user database to use as your priority deadline date?

Modifying System Setup

*Select **Tools, Setup** from the menu bar*

*Click **Packaging, System***


EDExpress for Windows 1999 - 2000
File
Process
Help
Utilities
Query
Browse
File Formats
Global
App Express
Academic Year Profile
Fund Maintenance
Award Methodology
Budgets
User Defined Formulas
SAP Values
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

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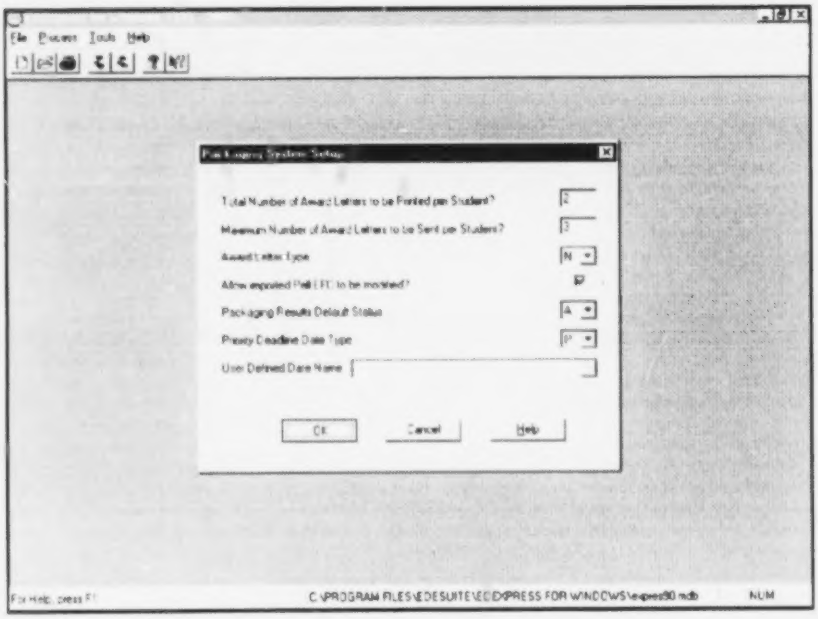
File Process Tools Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM
OK
Cancel
Help

Packaging System Setup

Total Number of Award Letters to be Printed per Student? 2

Maximum Number of Award Letters to be Sent per Student? 3

Award Letter Type N

Allow imported Pell EFC to be modified? ☑

Packaging Results Default Status A

Priority Deadline Date Type P

User Defined Date Name

Enter a value for the ***Total Number of Award Letters to be Printed per Student*** *and for the* ***Maximum Number of Award Letters to be Sent per Student.***

Click on the ***Award Letter Type*** *to be printed when printing award letters. Valid award letter types are:*

- ***O*** *= Offer Letter (reply requested)*
- ***N*** *= Notification Letter (no reply needed)*

Click the ***Allow Imported Pell EFC to be Modified?*** *checkbox only if you want to allow the Pell EFC field imported from the ISIR record to be modified. Clicking this checkbox ensures that the Pell EFC field is modifiable (i.e. recalculate Pell). Pell Formulas 1 and 2 allocate evenly across terms.*

Select the ***Packaging Results Default Status*** *for students who are packaged. The two default options are:*

- ***O*** *= Offered*
- ***A*** *= Accepted*

Click the date type you wish to use as your Priority Deadline Date when indexing for packaging process and reports. Valid Priority Deadline Date types are:

- ***A*** *= Received Date*
- ***P*** *= Processed Date*
- ***R*** *= Ready Date*
- ***U*** *- User Defined Date*

Click the drop down arrow in the ***User Defined Date Name*** *field to view a list of all dates set up in the user database, then click the date to use as the Priority Deadline Date.*

Click ***OK****.*

Note

The User Defined Date Name field is enabled only if the Priority Deadline Date Type is U.

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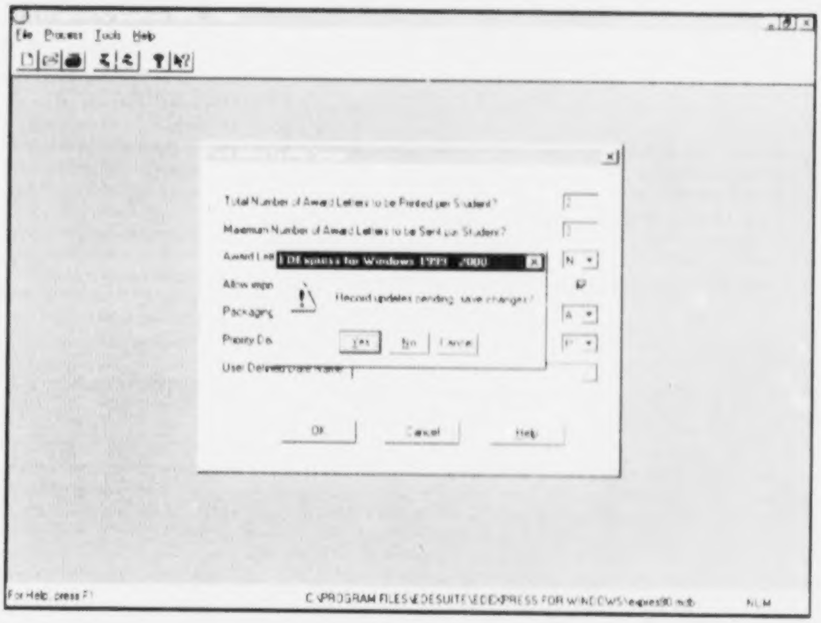
*Click **Yes** to save changes.*

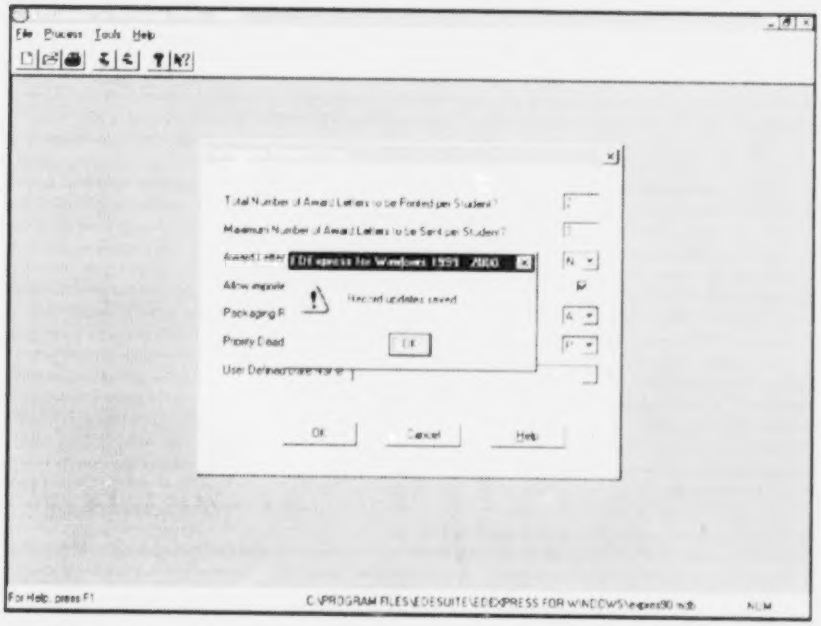

File Process Tools Help
Total Number of Award Letters to be Printed per Student?
Maximum Number of Award Letters to be Sent per Student?
Award Let
Allow impo
Packaging
Priority Da
User Defined Date Name
Yes
No
Cancel
OK
Cancel
Help
For Help, press F1
NUM

EDExpress for Windows 1999 - 2000

Record updates pending, save changes?

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Click **OK**.*


File Process Tools Help
Total Number of Award Letters to be Printed per Student?
Maximum Number of Award Letters to be Sent per Student?
Award Letter
Allow impute
Packaging R
Priority Dead
User Defined Date Name
OK
OK
Cancel
Help
For Help, press F1
NUM

EDExpress for Windows 1999 - 2000

Record updates saved

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

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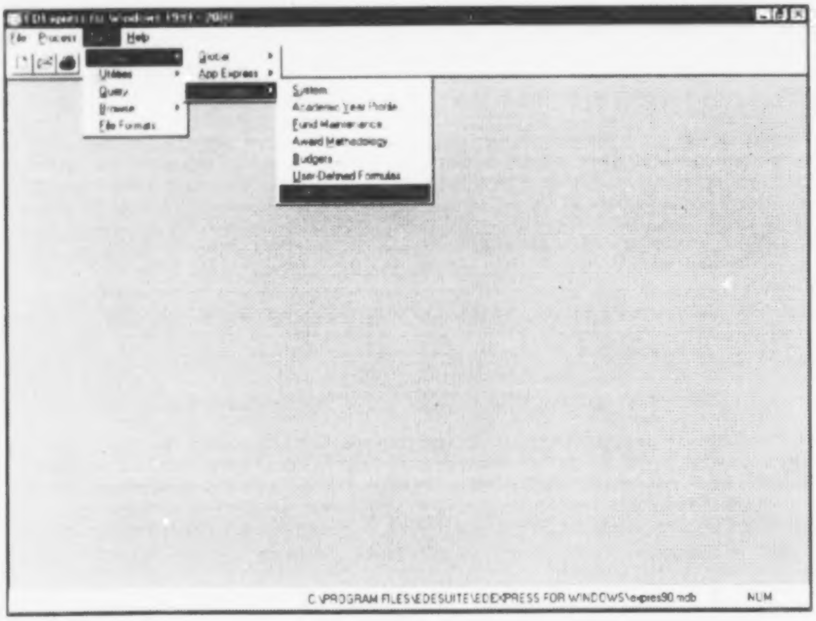
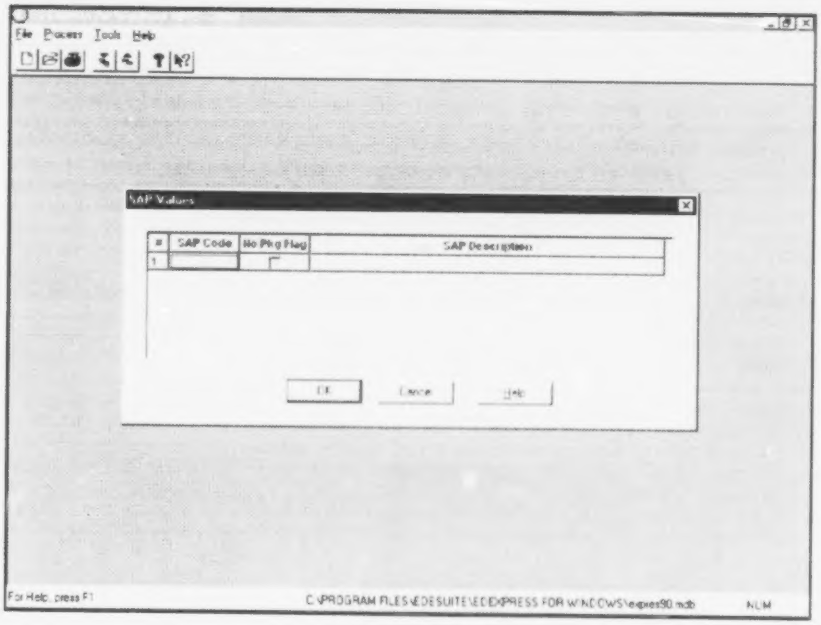
Satisfactory Academic Progress

EDExpress includes a setup function so you can define your own codes for Satisfactory Academic Progress (SAP). You can create unlimited SAP codes; for each code, you can set a flag to prevent the packaging process from continuing for a student with one of those codes. Once defined, the values can be entered into each record manually or by using multiple entry.


EDExpress for Windows 1999 - 2000
File
Process
Help
Utilities
Query
Browse
File Formats
Global
App Express
System
Academic Year Profile
Fund Maintenance
Award Methodology
Budgets
User-Defined Formulas
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

To enter Satisfactory Academic Progress Tables, select ***Tools/ Setup/Packaging/SAP Values*** *from the main menu bar.*

This is the blank SAP values dialog box.


File Process Tools Help
SAP Values
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

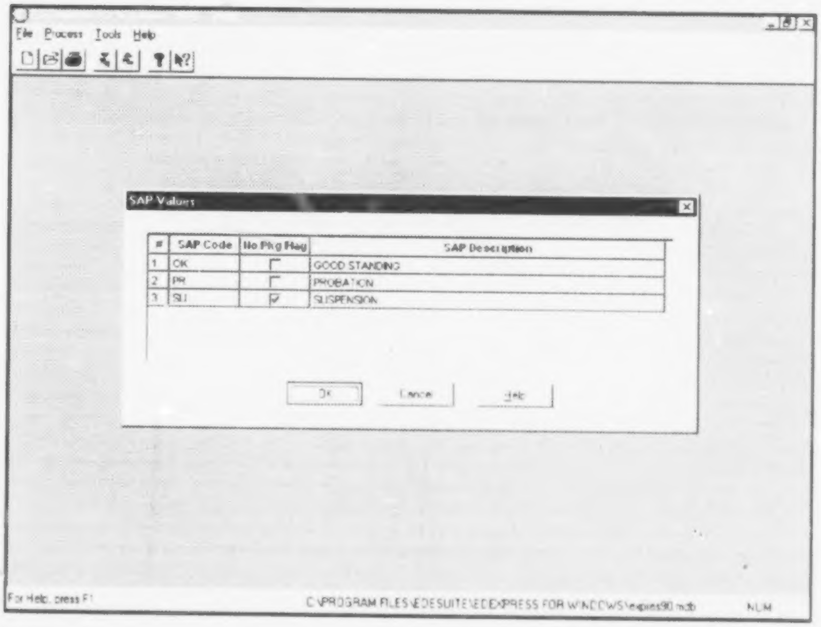
#	SAP Code	No Pkg Flag	SAP Description
1		☐	

Enter a free-form code to identify the SAP entry. (This code can be entered in the SAP field of the packaging record.)

Enter a free-form description of the SAP entry.

To prevent a student with a particular SAP code from being packaged automatically, click the ***No Pkg Flag****.*

Click ***OK****.*


File Process Tools Help
SAP Values
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

#	SAP Code	No Pkg Flag	SAP Description
1	OK	☐	GOOD STANDING
2	PR	☐	PROBATION
3	SU	☑	SUSPENSION

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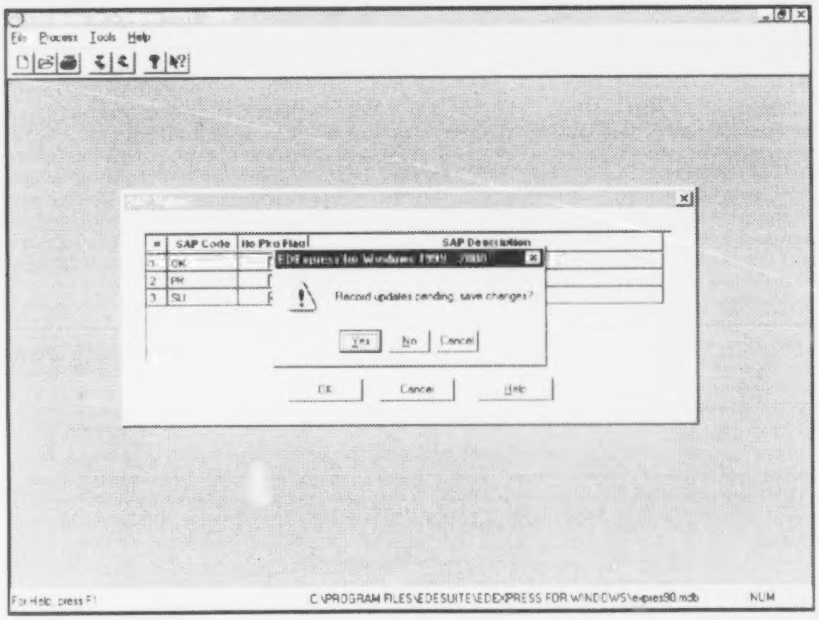
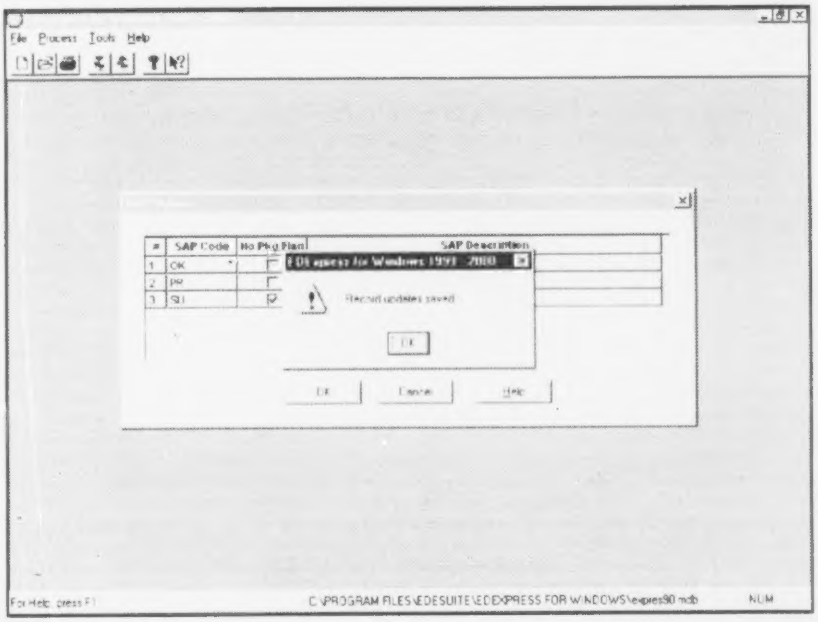

File Process Tools Help
EDExpress for Windows 1999 - 2000
Yes
No
Cancel
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

#	SAP Code	No Pkg Flag	SAP Description
1	OK		
2	PR		
3	SU		

Record updates pending, save changes?

Click **Yes** to save the record.


File Process Tools Help
EDExpress for Windows 1999 - 2000
OK
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

#	SAP Code	No Pkg Flag	SAP Description
1	OK	☐	
2	PR	☐	
3	SU	☑	

Record updates saved.

Click **OK** to continue.

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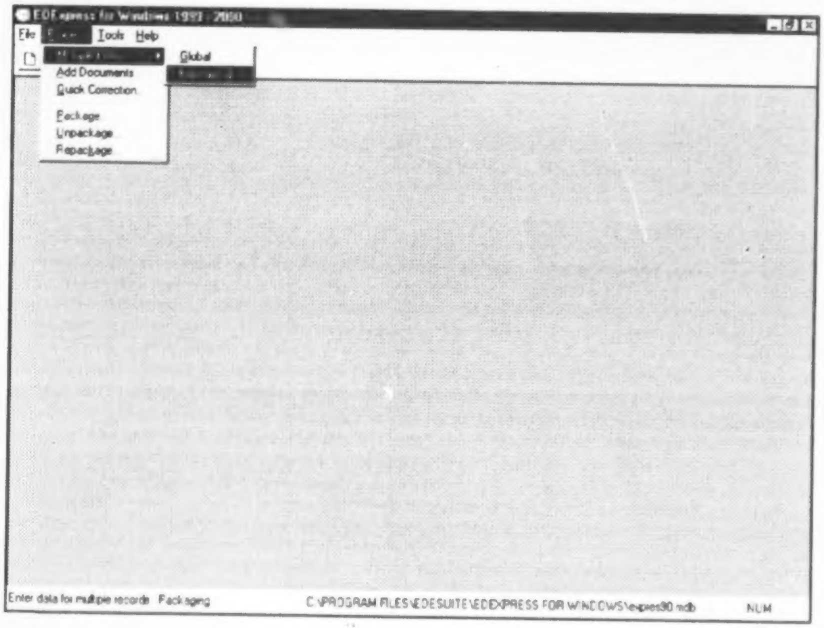
Using Multiple Entry to Update SAPs

Using the Multiple Entry function, you can update various fields in packaging records for multiple students at one time. First, update each field with the data you want changed on all of the records. Then specify the group of records by using Selection Criteria, by entering a group of students' SSNs, or by importing a file of SSNs.

In this example, you will update records with the SAP codes you just created.

*Select **Process/Multiple Entry/Packaging** from the menu bar.*


EDExpress for Windows 1999 - 2000
File
Tools
Help
Global
Add Documents
Quick Correction
Package
Unpackage
Repackage
NUM

Enter data for multiple records: Packaging

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

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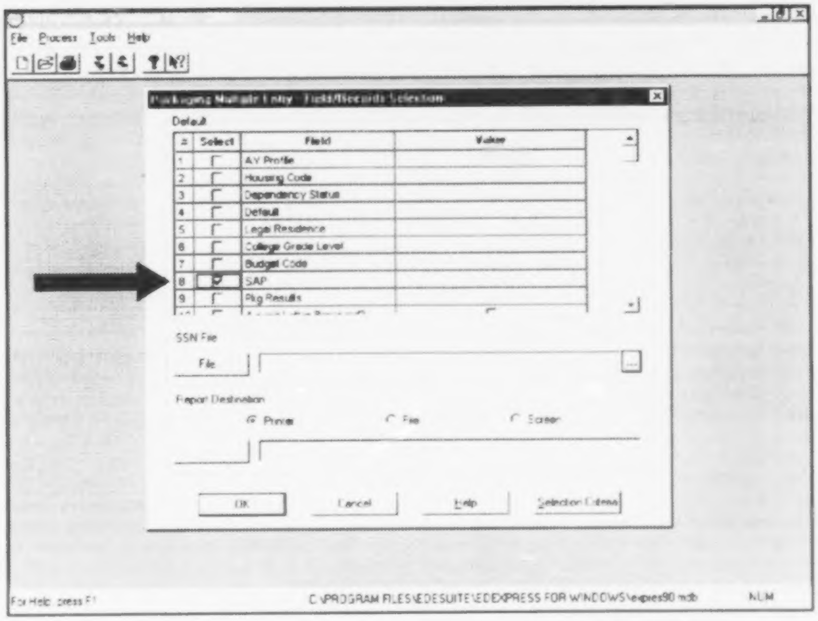

File Process Tools Help
OK
Cancel
Help
Selection Criteria
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Packaging Multiple Entry - Field/Records Selection

Default

#	Select	Field	Value
1	☐	AY Profile	
2	☐	Housing Code	
3	☐	Dependency Status	
4	☐	Default	
5	☐	Legal Residence	
6	☐	College Grade Level	
7	☐	Budget Code	
8	☑	SAP	
9	☐	Pkg Results	

SSN File

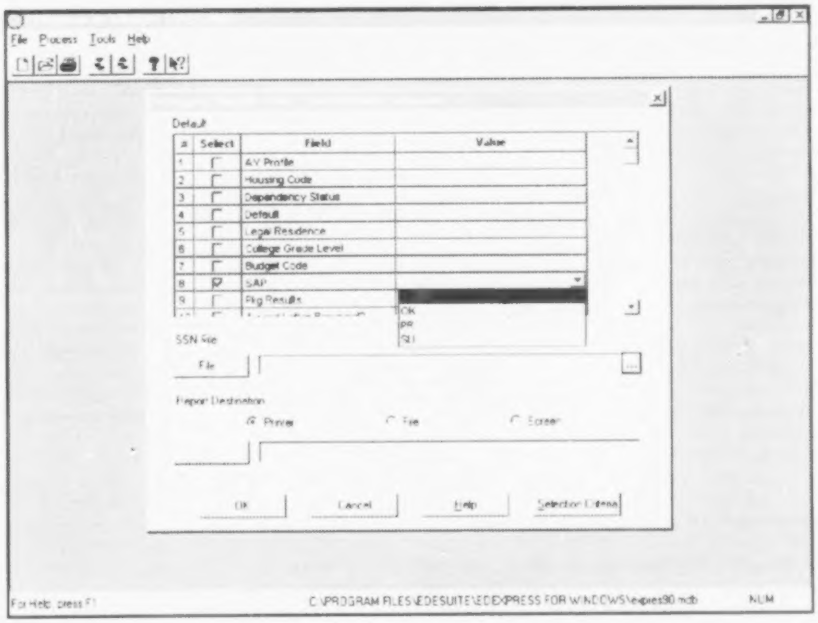
File

Report Destination

● Printer ○ File ○ Screen

The Multiple Entry dialog box appears.

*Click the check box next to **SAP**.*


File Process Tools Help
OK
PR
SU
OK
Cancel
Help
Selection Criteria
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Default

#	Select	Field	Value
1	☐	AY Profile	
2	☐	Housing Code	
3	☐	Dependency Status	
4	☐	Default	
5	☐	Legal Residence	
6	☐	College Grade Level	
7	☐	Budget Code	
8	☑	SAP	
9	☐	Pkg Results	

SSN File

File

Report Destination

● Printer ○ File ○ Screen

*Select the value you want to assign to a group of students. Click the **Value** button next to the SAP field. In this example, we selected **SU** for suspended.*

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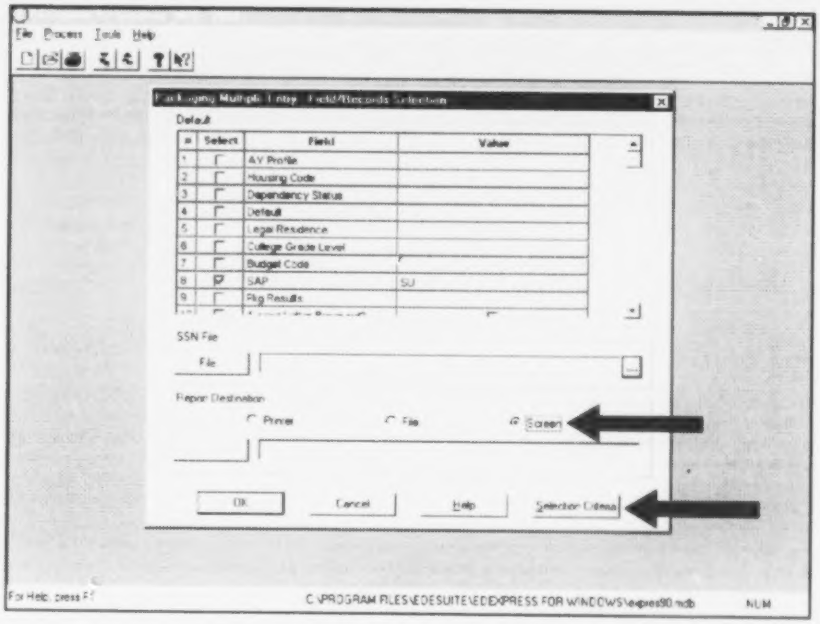
*Select **Screen** to route the edit report to the screen. Now you need to specify which records to update.*

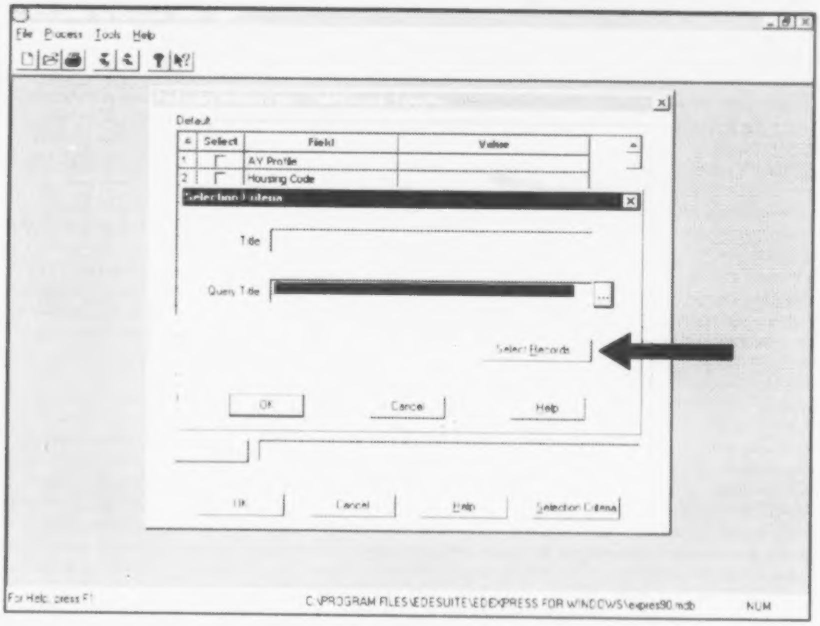
*Click the **Selection Criteria** button.*


File Process Tools Help
Packaging Multiple Entry - Field/Records Selection
Default
SSN File
File
Report Destination
Printer
File
Screen
OK
Cancel
Help
Selection Criteria
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

#	Select	Field	Value
1	☐	AY Profile	
2	☐	Housing Code	
3	☐	Dependency Status	
4	☐	Default	
5	☐	Legal Residence	
6	☐	College Grade Level	
7	☐	Budget Code	
8	☑	SAP	SU
9	☐	Pkg Results	

Report Destination: ○ Printer ○ File ● Screen

*Click the **Selected Records** button to view a list of available student records.*


File Process Tools Help
Default
Selection Criteria
Title
Query Title
Select Records
OK
Cancel
Help
OK
Cancel
Help
Selection Criteria
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

#	Select	Field	Value
1	☐	AY Profile	
2	☐	Housing Code	

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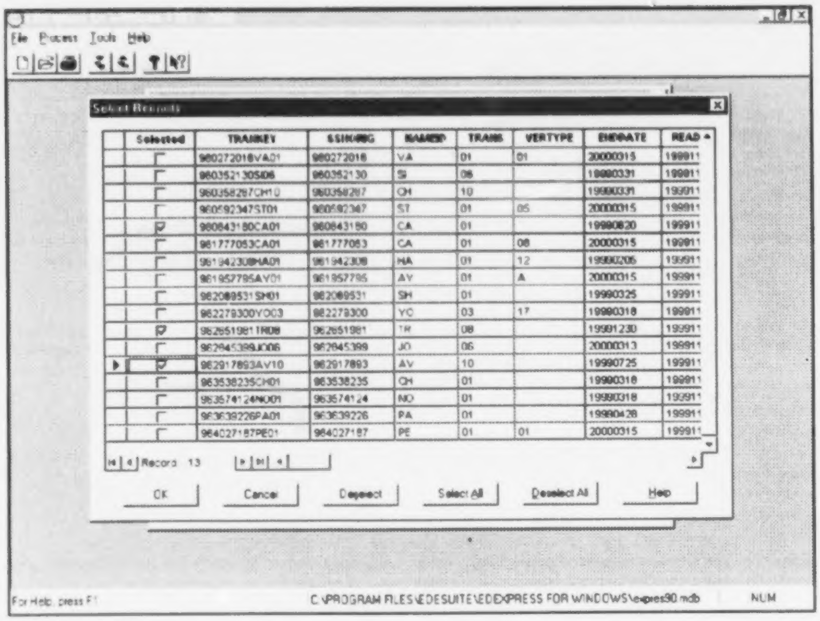
Tip:

Records with a P status (packaged) cannot be updated using Multiple Entry.



File Process Tools Help
Select Records

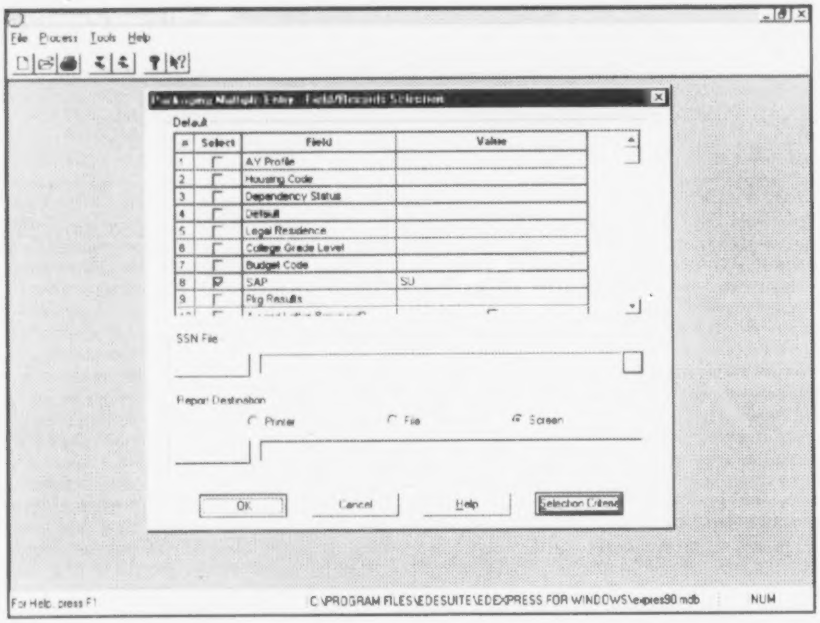
	Selected	TRAINKEY	SSNUMG	NAMEID	TRANS	VERTYPE	ENDDATE	READ
	☐	960272016VA01	960272016	VA	01	01	20000315	199911
	☐	960352130SI06	960352130	SI	06		19980331	199911
	☐	960358287CH10	960358287	CH	10		19980331	199911
	☐	960592347ST01	960592347	ST	01	05	20000315	199911
	☑	960843180CA01	960843180	CA	01		19980820	199911
	☐	961777063CA01	961777063	CA	01	08	20000315	199911
	☐	961942308HA01	961942308	HA	01	12	19990206	199911
	☐	961957795AY01	961957795	AY	01	A	20000315	199911
	☐	962089531SH01	962089531	SH	01		19990325	199911
	☐	962278300YO03	962278300	YO	03	17	19980318	199911
	☑	962651981TR08	962651981	TR	08		19991230	199911
	☐	962845399JO06	962845399	JO	06		20000313	199911
▶	☑	962917893AV10	962917893	AV	10		19990725	199911
	☐	963538235CH01	963538235	CH	01		19980318	199911
	☐	963574124NO01	963574124	NO	01		19980318	199911
	☐	963639226PA01	963639226	PA	01		19980428	199911
	☐	964027187PE01	964027187	PE	01	01	20000315	199911

Record 13
OK
Cancel
Deselect
Select All
Deselect All
Help
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Click the check box for the records you need to update.

*Click **OK** when complete.*



File Process Tools Help
Packaging Multiple Entry - Field/Records Selection
Default

#	Select	Field	Value
1	☐	AY Profile	
2	☐	Housing Code	
3	☐	Dependency Status	
4	☐	Default	
5	☐	Legal Residence	
6	☐	College Grade Level	
7	☐	Budget Code	
8	☑	SAP	SU
9	☐	Pkg Results	

SSN File
Report Destination

○ Printer ○ File ● Screen

OK
Cancel
Help
Selection Criteria
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

NUM

*Click **OK** to continue.*

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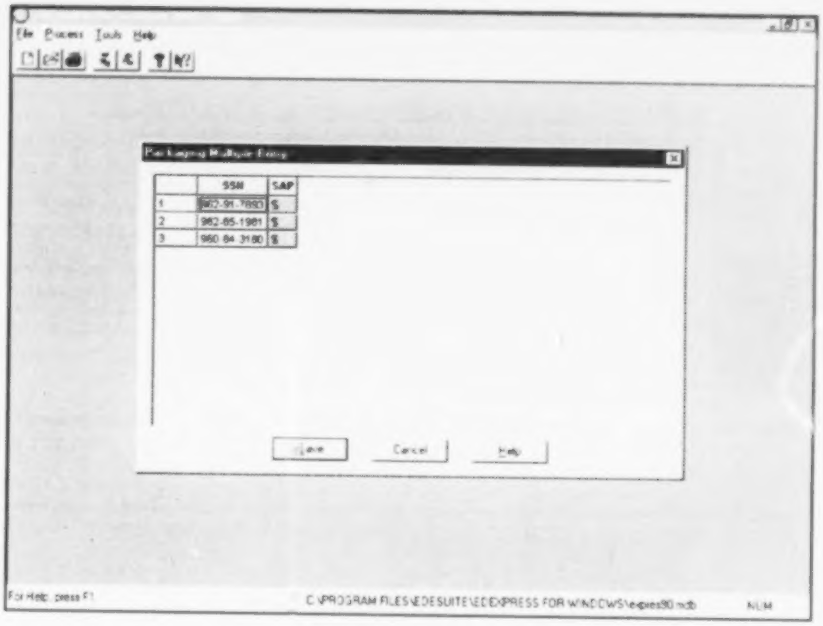
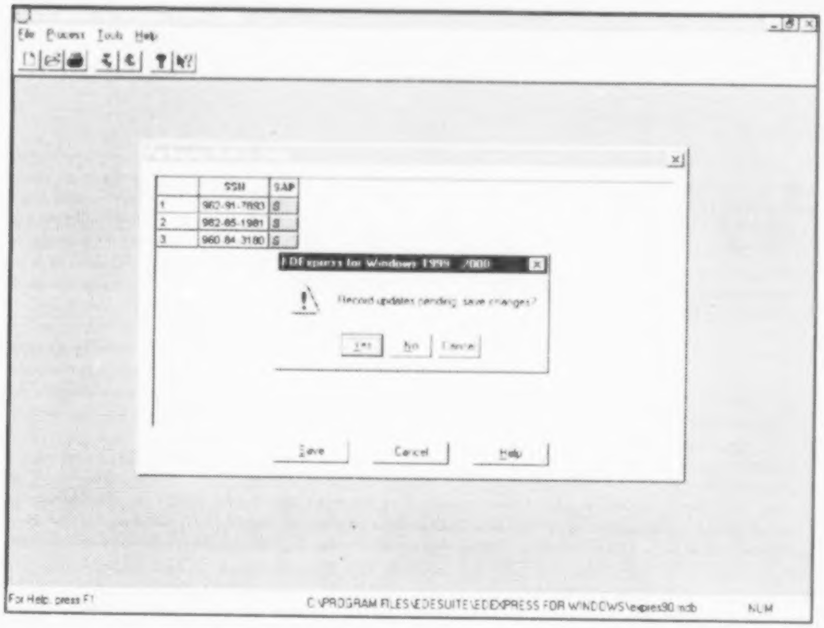
The records selected are displayed.

*Click **Save** to make the updates.*


File Process Tools Help
Packaging Multiple Entry
Save
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

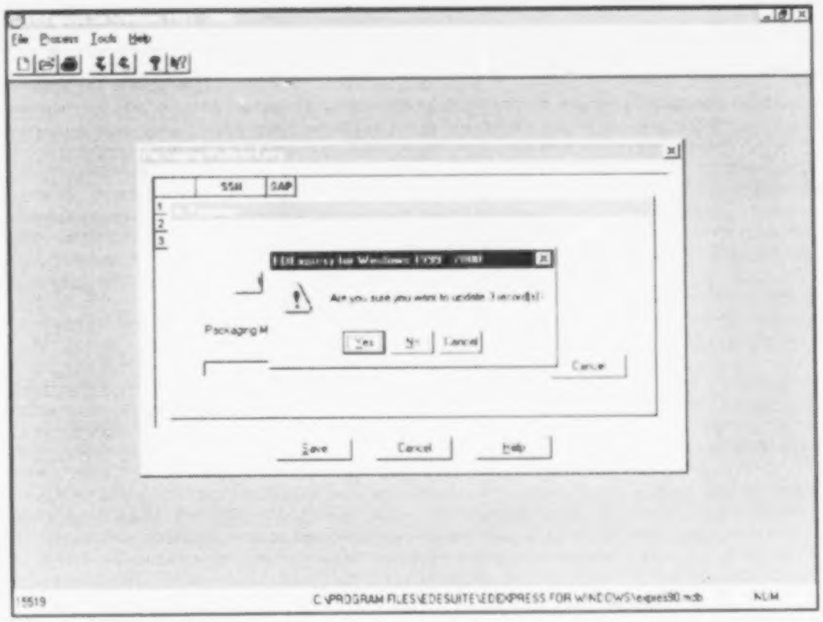
	SSN	SAP
1	982-91-7893	S
2	982-85-1981	S
3	980-84-3180	S

*Click **Yes** to save the updates you've made to these records.*


File Process Tools Help
EDExpress for Windows 1999 - 2000
Yes
No
Cancel
Save
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

	SSN	SAP
1	982-91-7893	S
2	982-85-1981	S
3	980-84-3180	S

Record updates pending; save changes?

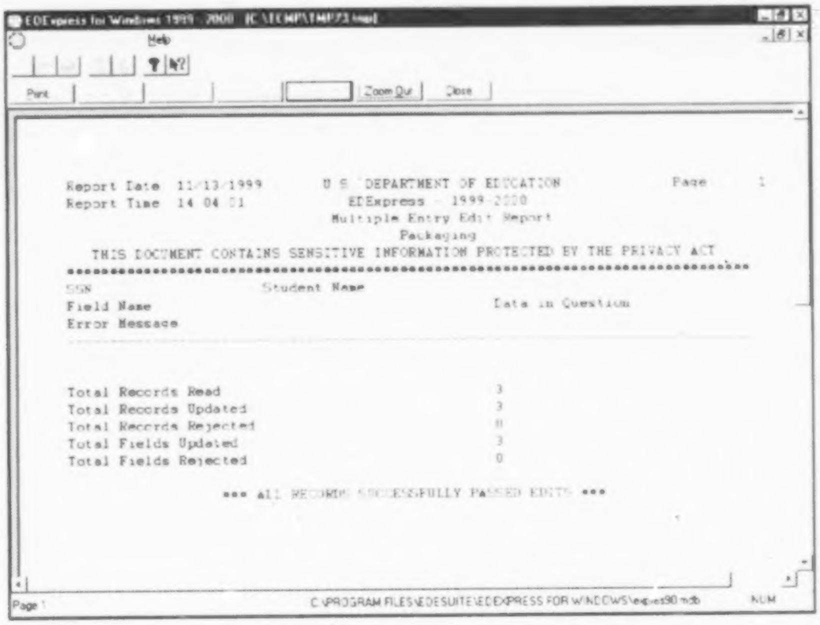


File Process Tools Help
SSN
SAP
1
2
3
EDExpress for Windows 1999 - 2000
Packaging M
Yes
No
Cancel
Cancel
Save
Cancel
Help
15519
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Are you sure you want to update 3 record(s)?

*Click **Yes** to verify*

At the end of the multiple entry packaging process, an edit report is produced that shows the total number of records updated. The report also lists the records that were rejected and gives details about those records, including SSN, name, and the associated error message that caused the rejection.



EDExpress for Windows 1999 - 2000
Help
Print
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

```
Report Date  11/13/1999       U.S. DEPARTMENT OF EDUCATION            Page     1
Report Time  14:04:01             EDExpress - 1999-2000
                               Multiple Entry Edit Report
                                       Packaging
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*********************************************************************************
SSN                        Student Name
Field Name                                         Data in Question
Error Message
---------------------------------------------------------------------------------


Total Records Read                                 3
Total Records Updated                              3
Total Records Rejected                             0
Total Fields Updated                               3
Total Fields Rejected                              0

              *** ALL RECORDS SUCCESSFULLY PASSED EDITS ***
```

The edit report indicates that three records were updated.

Apply What You Know

In the exercises you will create an Academic Year Profile for your institution.

School Attributes

- Academic Year consists of two terms: Fall and Spring.
- Length of the Academic Year = 9 months; use EFC for 9 months.
- Use Pell Formula for Academdic Year of 30 weeks, with standard terms.
- Allocate aid equally across both terms for all types of aid.
- Assume all students will enroll full time.

Create the Record

1. From the Main Menu, select **Tools/Setup/Packaging/Academic Year Profile**.
2. Click **Add** to create a new record.
3. Type a code.
4. Click the **Default** box.
5. Type a title.
6. Select the appropriate Pell Formula type.
7. Set the number of months for the EFC.
8. Create your terms.
9. Type the term name.
10. Select an enrollment status.
11. Select allocation percentage for each aid type.
12. Click **Save**.

Edit Multiple Packaging Records

1. Select **Process/Multiple Entry/Packaging** from the menu bar.
2. The Multiple Entry dialog box appears.
3. The Packaging Multiple Entry dialog box contains a view screen displaying all the fields that can be updated using multiple entry. Click the checkbox next to the appropriate field to indicate that you want to update that field. Beside the checkbox is an edit field with a default value to use in updating the field. A default value is optional.
4. Click **Selection Criteria**.
5. Click the ellipsis button to select a query.
6. To further identify students who meet the criteria, click the **Select Records** button.
7. Mark the records you want to update.
8. Click **OK**.
9. Click **OK** again.
10. Click **Screen**, **File**, or **Printer** as the output destination.
11. If you print to a file, no hard copy prints on your printer. To print a hard copy, repeat the print process and select **Printer** as your output destination.
12. Click **OK** when you are finished.
13. A grid of all students eligible for update appears. You can enter your changes to the Packaging record.
14. Verify that the information is correct for each student.
15. Click **Save**.

Create a Query

Create a query for all undergraduate students with an SAP status of Suspended.

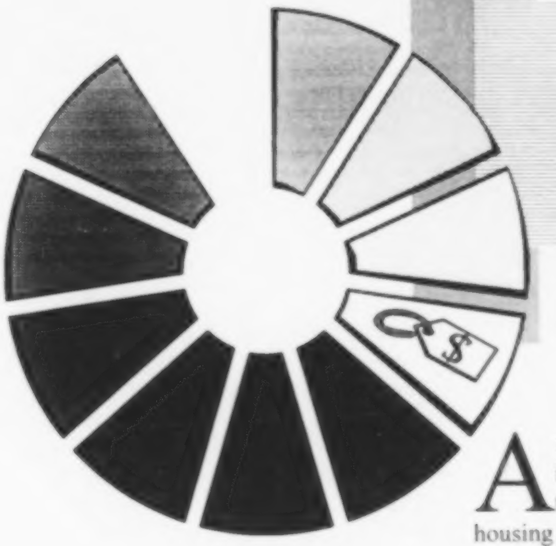
To review steps on how to create a query, see page 2-32.

Discussion Questions for Chapter 3

1. Up to how many terms can be defined for each AYP?
2. Can the EFC length be any number other than 9 months?
3. What must you set if your Pell Formula type is 2, 4, or 5?
4. Does the AYP have to be set manually for each student record?
5. Can an SAP code prevent a record from being packaged?

Chapter 4

Setting Up Budgets



An important part of defining the award process begins with assigning a cost-of-attendance budget for an applicant. Budgets vary by the grade classification (graduate or undergraduate), residency, housing status, or combinations of variables that distinguish one group of students from another. By using queries, you can define student budgets using combinations of variables or establish a single budget for your entire applicant population.

4 Setting Up Budgets

Objectives

1. Learn the components of a student expense budget
2. Learn the advantage of creating default budgets for groups of students
3. Learn how to create a budget record in EDExpress for Windows

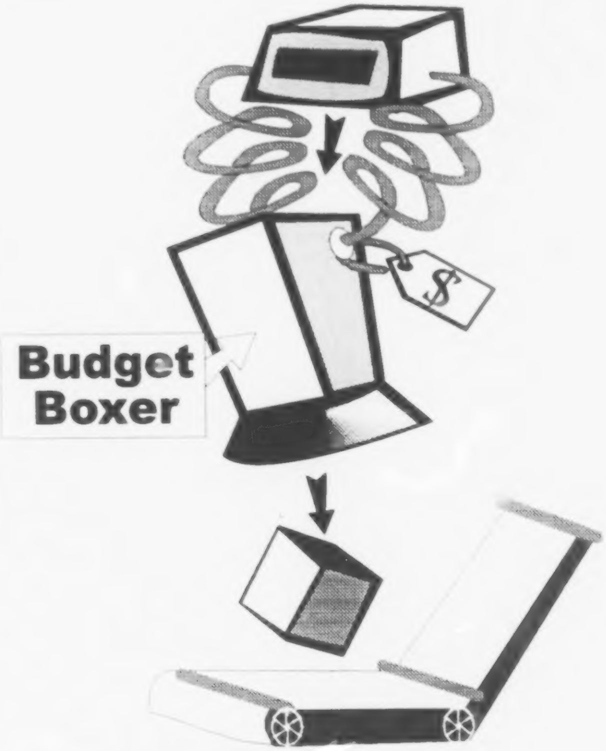
What is a Budget?

A budget is the total amount it costs a student to go to school. It includes tuition and fees, room and board, books and supplies, transportation, and the miscellaneous expenses as determined by the school.

Why set up budgets?

The advantage of setting up electronic profiles of the budgets you use for your students is that the software does the work for you. The budget is automatically calculated and assigned to each record you import.

Once assigned, all budget components become part of the student's record. In addition, when the budget is applied to the record, the student's need is also automatically calculated (assuming an EFC is present).



83

SAMPLE

Establish Cost-of-Attendance Budget Worksheet

1. Establish an up to 4-character alphanumeric code. 01

2. Establish a priority number. 1

3. Enter up to fifty (50) characters to create a free-form title or name for this budget.

Dependent on campus

4. Select a Query (see Chapter 2) from the list of Queries previously entered. This budget is assigned to the students selected by the Query identified in this field.

Dependent on campus

Budget Area	Dollar Amount	User Defined Budget Area	User Amount
Tuition & Fees	$7.000	Loan Fees	$150
Room & Board	$3.000		
Books & Supplies	$800		
Transportation	$750		
Miscellaneous	$800		

Total $12.500

Setting Up Budgets

Use the budget dialog box to define student budgets or establish a single budget for your entire applicant population.

For each budget you create, you will need to define:

- **Budget code**—used to identify the record.
- **Priority**—the order in which the budget database is searched. (The first budget where the student meets the selection criteria is applied to that student.)
- **Title**—a description to easily identify the population represented.
- **Criteria**—a query defined to limit the student records the budget applies to based on student attributes.
- **Budget Amounts**—the dollar amounts for the standard budget components.
- **User Defined Budget Amounts**—the field labels and dollar amounts specific to your school and student group.

The software automatically calculates a total based on the entered component amounts.

You should create budgets that apply from the most specific student group to the most general. This ensures that students who overlap from one group to another will be assigned the budget that fits best. This is sometimes called a pyramid approach to budgets.

Create as many budgets as needed for your student populations.

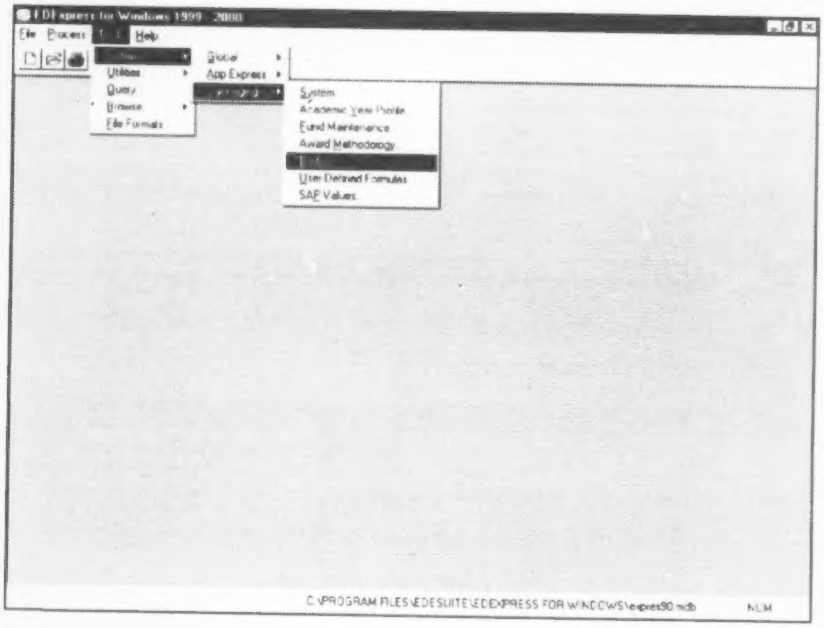
What Happens Next

- When a record is created in the Packaging database as the result of an import, EDExpress calculates the budget based upon the criteria used.
- If only one budget is created in the database, that budget becomes the default for all records you create.
- When you add a budget after a record has been added to the Packaging database or after the record has been packaged, you must manually add the budget to the applicable student records previously recorded.
- Once a budget is assigned to a student, you can no longer modify the budget in Setup. You can only make the adjustment on an individual student's record.

Creating a Budget

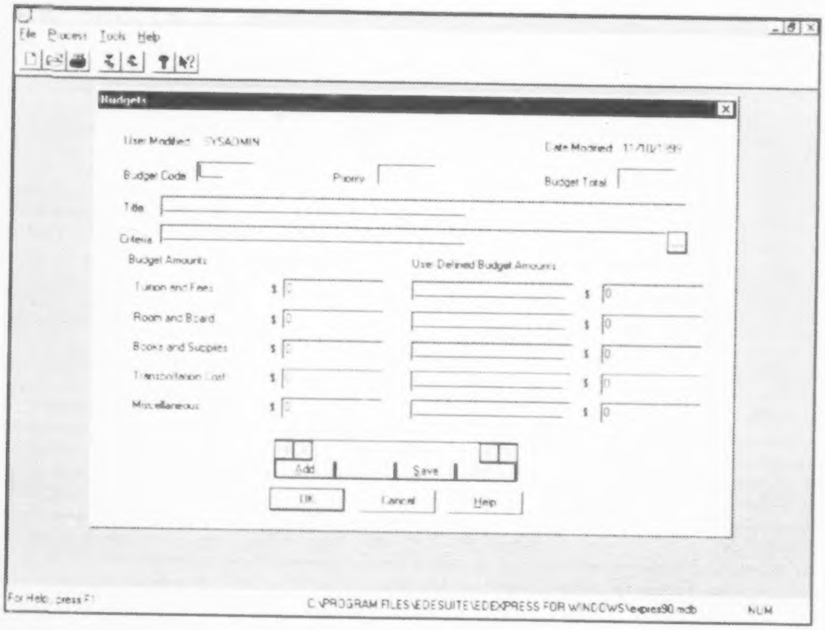
To create a new budget record.

*Select **Tools/Setup/ Packaging/Budgets** from the menu bar.*


EDExpress for Windows 1999 - 2000
File Process Tools Help
Setup
Utilities
Query
Browse
File Formats
Global
App Express
Packaging
System
Academic Year Profile
Fund Maintenance
Award Methodology
Budgets
User Defined Formulas
SAP Values
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

The Budget Dialog box is displayed.

*If a budget record had been previously entered, you must select **Add** to enter a new record. If not, EDExpress automatically opens a new record.*


File Process Tools Help
Budgets
Budget Code
Priority
Budget Total
Title
Criteria
Budget Amounts
User Defined Budget Amounts
Tuition and Fees
Room and Board
Books and Supplies
Transportation Cost
Miscellaneous
Add
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

User Modified SYSADMIN

Date Modified 11/10/1998

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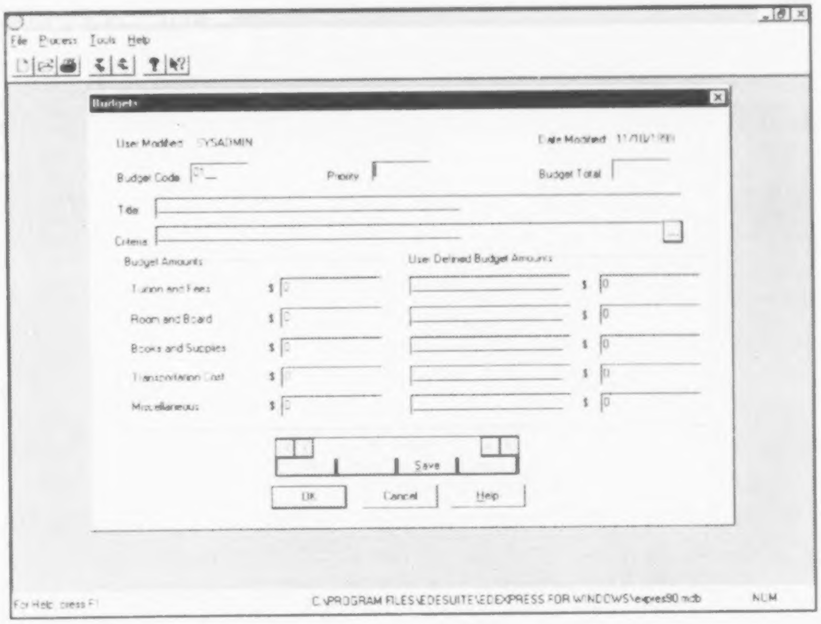
Tip:

It is beneficial to set up the priority structure to move from the smallest group of students to the largest. If you use Criteria in your budgets, create one budget with no criteria and a priority of 999 to ensure that all students are assigned a budget.



User Modified SYSADMIN
Date Modified 11/10/1998
Budget Code 01
Priority
Budget Total
Title
Criteria

Budget Amounts
Tuition and Fees $ 0
Room and Board $ 0
Books and Supplies $ 0
Transportation Cost $ 0
Miscellaneous $ 0

User Defined Budget Amounts
$ 0
$ 0
$ 0
$ 0
$ 0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

In this example, we will refer to the budget worksheet found at the beginning of this chapter. First, type a budget code which serves as the record's identifier.

Tab to the next field.

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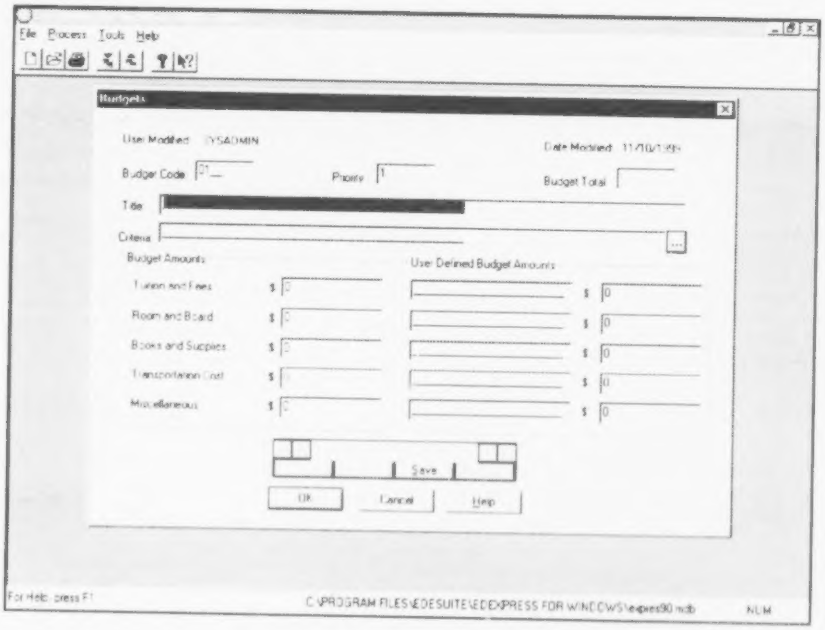
In the Priority field, type the priority code (valid values are 1-999) and press ***Tab****.*

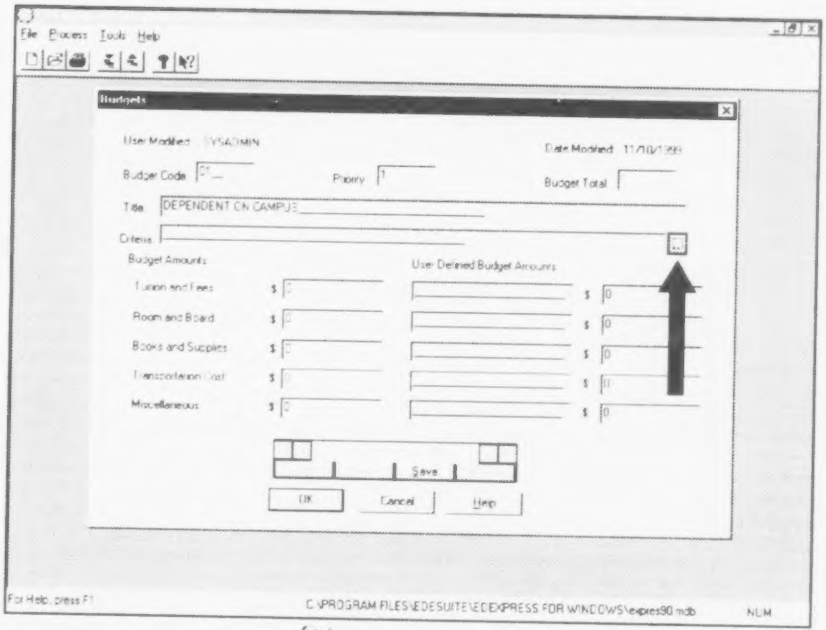

File Process Tools Help
Budgets
Criteria
Budget Amounts
User Defined Budget Amounts
Save
OK
Cancel
Help
For Help, press F1
NUM

User Modified: SYSADMIN
Date Modified: 11/10/1999
Budget Code: 01
Priority: 1
Budget Total:
Tuition and Fees: $ 0 | $ 0
Room and Board: $ 0 | $ 0
Books and Supplies: $ 0 | $ 0
Transportation Cost: $ 0 | $ 0
Miscellaneous: $ 0 | $ 0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Next, type a title that is descriptive enough so you can later identify the group.

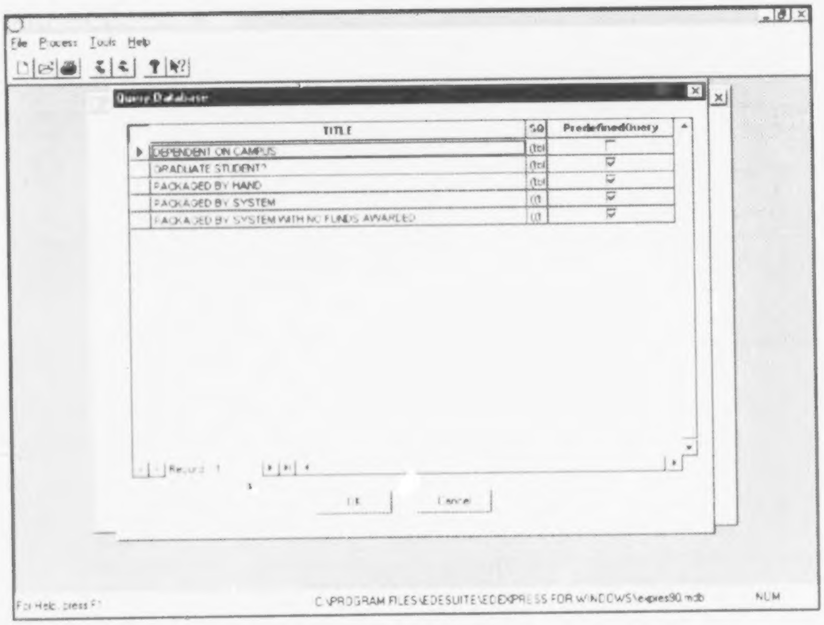
Type the query name in the ***Criteria*** *field or click the ellipsis button next to the field.*


File Process Tools Help
Budgets
Criteria
Budget Amounts
User Defined Budget Amounts
Save
OK
Cancel
Help
For Help, press F1
NUM

User Modified: SYSADMIN
Date Modified: 11/10/1999
Budget Code: 01
Priority: 1
Budget Total:
Title: DEPENDENT ON CAMPUS
Tuition and Fees: $ 0 | $ 0
Room and Board: $ 0 | $ 0
Books and Supplies: $ 0 | $ 0
Transportation Cost: $ 0 | $ 0
Miscellaneous: $ 0 | $ 0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

BEST COPY AVAILABLE


File Process Tools Help
Query Database
OK
Cancel
Record: 1

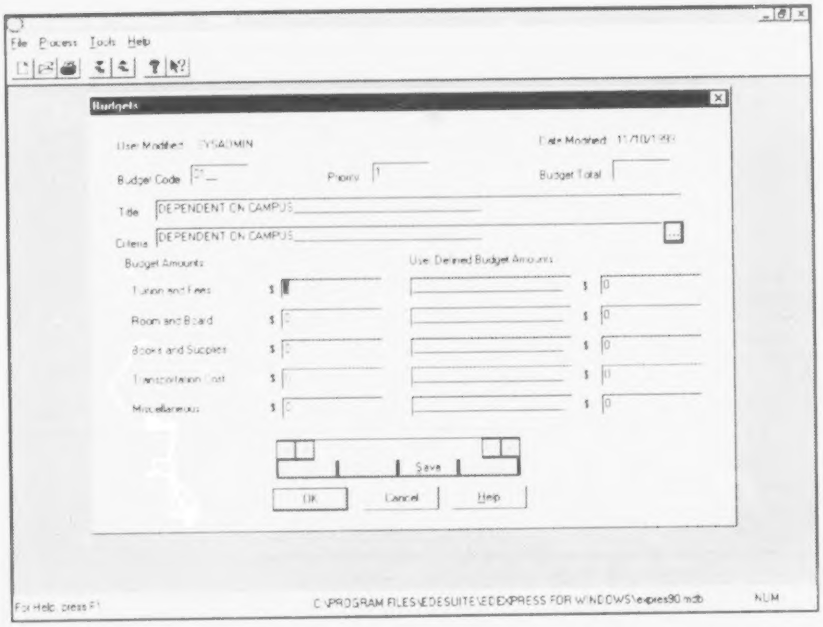
	TITLE	SQ	PredefinedQuery
▶	DEPENDENT ON CAMPUS	(tbl	☐
	GRADUATE STUDENTS	(tbl	☑
	PACKAGED BY HAND	(tbl	☑
	PACKAGED BY SYSTEM	((t	☑
	PACKAGED BY SYSTEM WITH NO FUNDS AWARDED	((t	☑

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

Select a query to assign this budget to a certain group of students.

If you click the ellipsis button, the query database displays.

Double-click the query you wish to select.


File Process Tools Help
Budgets
Budget Amounts
User Defined Budget Amounts
Save
OK
Cancel
Help

User Modified: SYSADMIN

Date Modified: 11/10/199[illegible]

Budget Code: 01

Priority: 1

Budget Total:

Title: DEPENDENT ON CAMPUS

Criteria: DEPENDENT ON CAMPUS

Tuition and Fees	$		$ 0
Room and Board	$ 0		$ 0
Books and Supplies	$ 0		$ 0
Transportation Cost	$ 0		$ 0
Miscellaneous	$ 0		$ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

The title of the query you select is displayed in the Criteria box.

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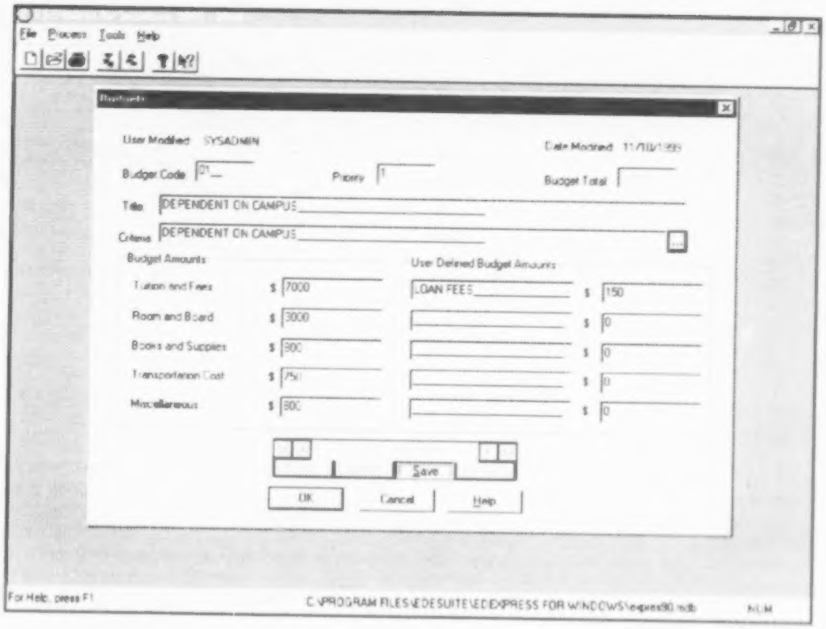
Type the amounts that apply to this budget type.

If there are other components of the budget, type the component title and the corresponding amount in the **User-Defined Budget Amounts**.

In this example we added an amount for loan fees.

You have now created a budget for dependent students living on campus.

Click **Save** to save the record.


File
Process
Tools
Help
Budgets
Save
OK
Cancel
Help

User Modified SYSADMIN

Date Modified 11/10/1999

Budget Code 01

Priority 1

Budget Total

Title DEPENDENT ON CAMPUS

Criteria DEPENDENT ON CAMPUS

Budget Amounts		User Defined Budget Amounts	
Tuition and Fees	$ 7000	LOAN FEES	$ 150
Room and Board	$ 3000		$ 0
Books and Supplies	$ 800		$ 0
Transportation Cost	$ 750		$ 0
Miscellaneous	$ 800		$ 0

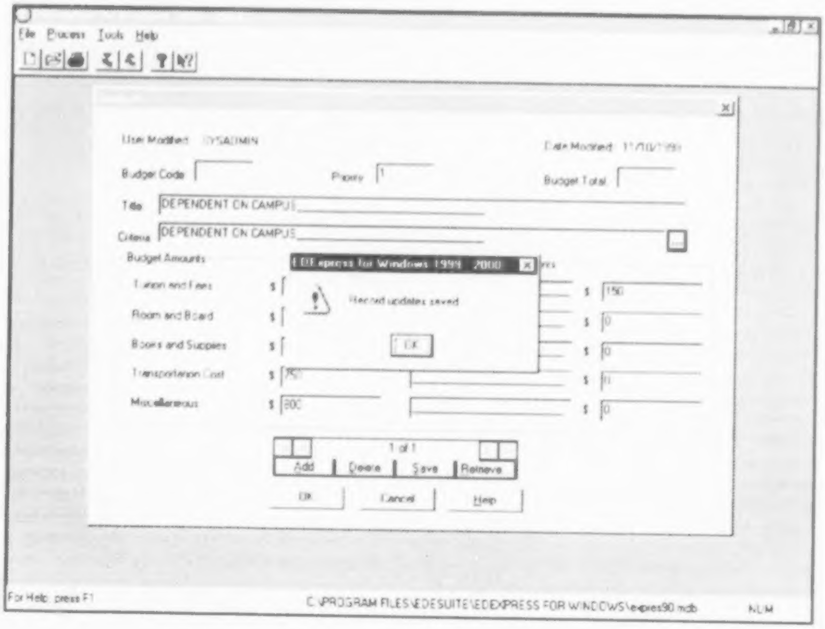
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

NUM

The record has been saved.

Click **OK** to continue.


File
Process
Tools
Help
EDExpress for Windows 1999–2000
OK
1 of 1
Add
Delete
Save
Retrieve
OK
Cancel
Help

User Modified SYSADMIN

Date Modified 11/10/1999

Budget Code

Priority 1

Budget Total

Title DEPENDENT ON CAMPUS

Criteria DEPENDENT ON CAMPUS

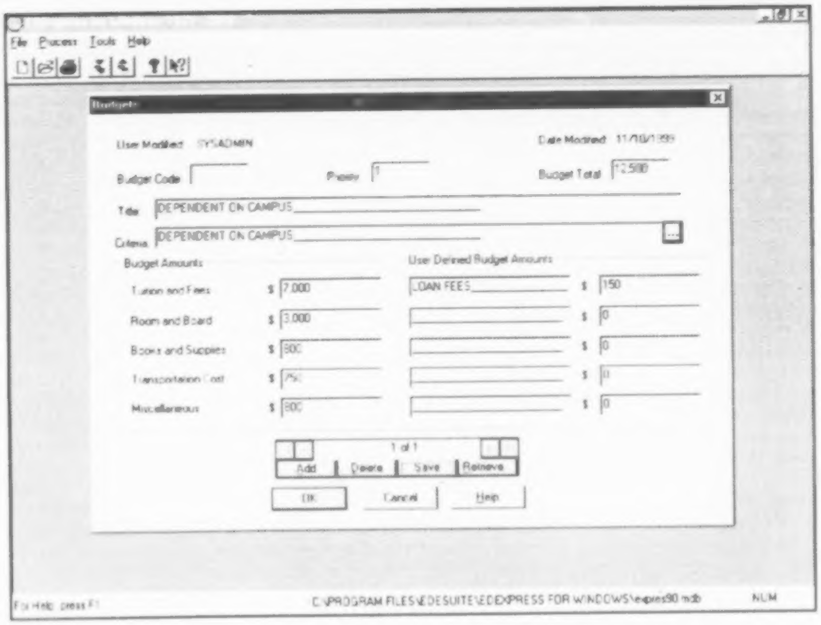
Record updates saved

Budget Amounts			
Tuition and Fees	$		$ 150
Room and Board	$		$ 0
Books and Supplies	$		$ 0
Transportation Cost	$ 750		$ 0
Miscellaneous	$ 800		$ 0

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

NUM



User Modified: SYSADMIN

Date Modified: 11/10/199[illegible]

Budget Code:

Priority: 1

Budget Total: 12,500

Title: DEPENDENT ON CAMPUS

Criteria: DEPENDENT ON CAMPUS

Budget Amounts		User Defined Budget Amounts	
Tuition and Fees	$ 7,000	LOAN FEES	$ 150
Room and Board	$ 3,000		$ 0
Books and Supplies	$ 800		$ 0
Transportation Cost	$ 750		$ 0
Miscellaneous	$ 800		$ 0

1 of 1

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb NUM

This is a complete budget record.

This budget is applied to dependent students that live on campus.

Notice the total has been calculated in the Budget Total field.

Tip:

If you are entering a budget record and then decide to cancel your entries for that record and start over, click ***Cancel*** *to close the Budget dialog box. Then select* ***Budget*** *from the Setup menu again, click* ***Add****, and enter the new record. Use On-Line Help to see examples of various budget setups.*

Tip:

You may want to skip priority numbers when setting up budgets to allow for additional budgets to be inserted later on.

Apply What You Know

Now you can create budgets.

Budget Attributes

Code: 01 Title: Dependent On Campus Priority: 1

Tuition and Fees	$7,000
Room and Board	$3,000
Books and Supplies	$800
Transportation	$750
Miscellaneous	$800
Loan Fees	$150

CRITERIA: Dependent students, living on campus.

Code: 02 Title: Independent Off Campus Priority: 2

Tuition and Fees	$7,000
Room and Board	$4,000
Books and Supplies	$800
Transportation	$1,500
Miscellaneous	$800
Loan Fees	$150

CRITERIA: Independent students, living off campus.

Code: 03 Title: Standard Priority: 3

Tuition and Fees	$7,000
Room and Board	$1,500
Books and Supplies	$800
Transportation	$750
Miscellaneous	$800

CRITERIA: None.

Create the Records

1. Select **Tools/Setup/Packaging/Budgets** from the menu bar.
2. Click **Add** to create a new record.
3. Type the Budget Code.
4. Type the Priority.
5. Type a descriptive title.
6. Click on the ellipsis button to select one of the queries you created.
7. Type the amounts that apply to the budget.
8. Add any user-defined budget fields and amounts.
9. Click **Save** when complete.

Create a Query

Create a query for graduate students from VA.

To review steps on how to create a query, see page 2-26.

Discussion Questions for Chapter 4

1. How do you assign different budgets to different groups of students?
2. What components can be included in a budget?
3. Does a budget tell you how much aid a student is eligible for?

5

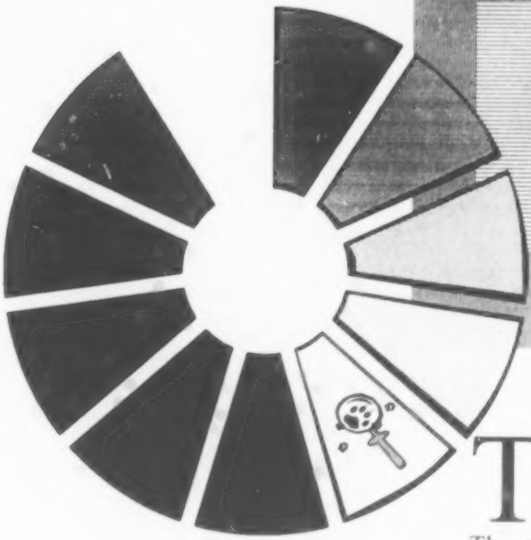
Setting Up Document Tracking

Objectives

1. Determine what documents your institution requires and needs to track.
2. Determine the attributes of those documents required by EDExpress for Windows Packaging software.
3. Create document records in EDExpress Global Setup.
4. Identify use of Add Documents feature.
5. Create Document Tracking Letter text.
6. Use the Print function to print a document tracking letter.

Chapter 5

Setting Up Document Tracking



To satisfy documentation requirements and meet an institution's needs, applicants may have to provide documents to complete the financial aid application process. These documents may include tax returns for verification or an institutional aid application. EDExpress for Windows can track the request and receipt of these required documents. You can define as many tracking documents as are required. EDExpress also provides the tools to create and print document tracking letters to notify the students of missing information.

Why Track Documents?

Information or documents required of a student aid applicant must be tracked if they are necessary for the packaging process or to determine if a student has completed a required task. For example, the school may require that all students selected for verification must complete the verification process before being awarded aid. In these cases, the school can track when all the required documents have been received and determine when the student is ready to be packaged. Schools can also use the document tracking functions in EDExpress to monitor other activities a student must complete, such as signing a form that indicates that the student completed the entrance interview for a student loan.

Document Tracking is a global feature of the software and is not specific to the Packaging functions, but it can be highly effective if integrated into the packaging process.

What documents do you need to track?

Make a list of all of the documents you want to track.

Documents
Student Tax Return
Parent Tax Return
Verification Worksheet
Prom Note
Entrance Interview Form

Steps for Tracking Documents

1. Define the kind of documents you need (tax returns, verification worksheets, etc.)
2. Set up documents in the Document Tracking database.
3. Define the total number of award letters and copies to be printed per student, and the number of times you send document tracking letters to a student in System Setup.
4. Add documents to student records:
   - Add Documents
   - Manual Entry
   - Multiple Entry
5. Print a list of students with documents (use Selection Criteria).
6. Create Document Tracking Letter text.
7. Print Document Tracking letters.
8. Update the Documents tab on each student record with status and receipt date.

Setting Up Document Tracking

EDExpress for Windows records your request for and receipt of documents such as tax returns or institutional aid applications from a student. The Document Tracking dialog box allows you to set up the defaults for your document tracking records.

Documents are added to student records either by using the Add Documents process or by manual entry. If you want some or all of your documents added to records automatically, you should use the Process/Add Documents feature. However, you can also manually add any document you determine is needed for that student.

Note:

Like the rest of EDExpress, Query is based on modules. Document tracking looks at ISIR records, therefore document tracking queries must be created in App Processing.

Step 1

For each document you create you:

- Create a code with which to track the document.
- Provide a year indicator if needed (this can also be left blank).
- Type a description of the document that prints on the tracking letter.

Step 2

To add documents automatically to student records using the Add Documents function, you must check either:

- Automatic Request—If checked with no other criteria specified, this document is added to all records (defined in Step 3).
- Required for Packaging—If checked, the document must be recorded as received or waived before the student's aid can be packaged.
- Required for Verification—If checked, this document will be assigned to any student selected for verification by the CPS.

Step 3

To select specific students to which you want to automatically request a document, you select:

- Query—Criteria that you create using the ISIR Query setup.
- Comment Code(s)—The document is applied to a record that contains any of the ISIR comment codes you specify. Comment codes are codes assigned to an ISIR by the CPS when it encounters confusing or missing information that does not cause the record to be rejected.

If you choose to use both Query and Comment Code(s), the student's record must meet both criteria (same as an AND statement.)

Note:

You may check whether documents are still required for packaging or verification by viewing teh Document Status field on the Demo tab. The Required for Packaging and Required for Verification flags, on each account set the status flag for these fields.

SAMPLE

Defining Documents Worksheet

1. Code: This code displays on reports and on the Document Tracking tab of the student's record (10-digit alphanumeric).

Code: PAR TAX

2. Year: Enter the Award year(s), if applicable, for the document being requested. This prints on reports and on the Document Tracking section of the student's record (9-digit alphanumeric).

Year: 1999-2000

3. Description: Enter a freeform description of the document. The description prints on the Document Tracking letter as the item being requested (48-digit alphanumeric).

Description: Your Parent's 1998 Federal Tax Return

4. Criteria: Enter Query to select the records that the document tracking code is written to.

Criteria: Dependent students

5. Automatic Request? Do you wish this document to be automatically requested when the Add Documents function is performed?

Automatic Request? Yes ☒ No ☐

6. Required for Packaging? Is this document required before your office can package these financial aid applicants?

Required for Packaging? Yes ☐ No ☒

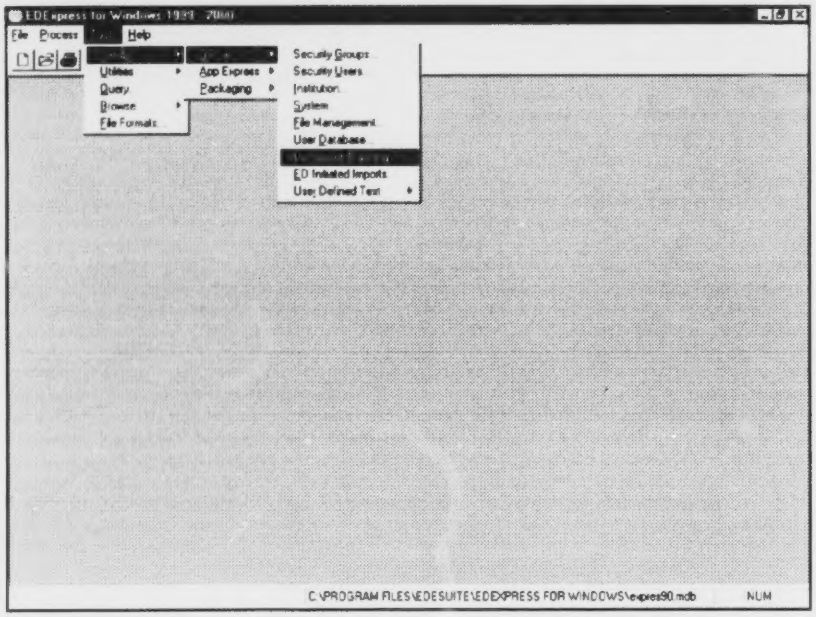
7. Required for Verification? Is this document being requested from only those students who have been selected for verification by the CPS?

Required for Verification? Yes ☐ No ☒

8. Comments: This document should be sent to those applicants whose ISIR records contain one of the following comment codes:

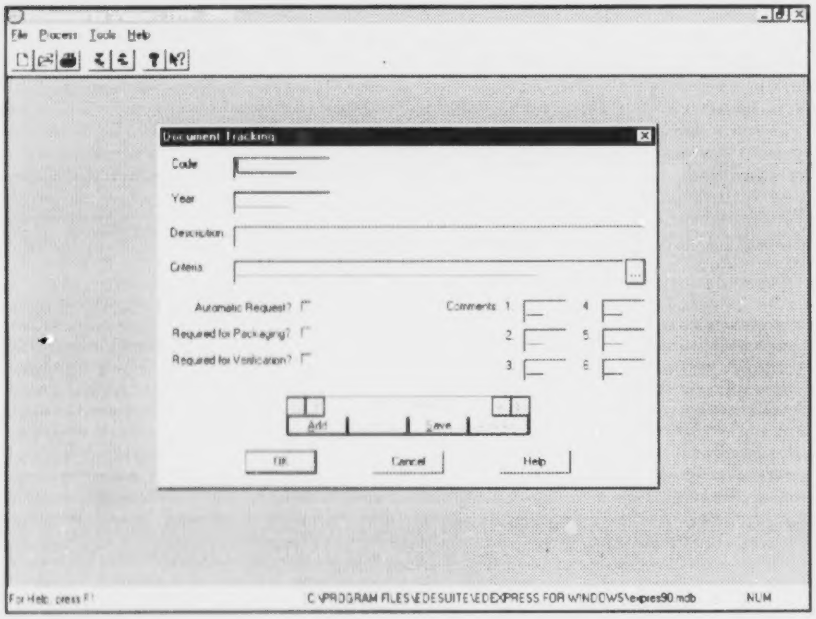
☐ ☐ ☐ ☐ ☐ ☐ 100

Create a Document


EDExpress for Windows 1999 - 2000
File
Process
Help
Utilities
Query
Browse
File Formats...
App Express
Packaging
Security Groups...
Security Users
Institution...
System
File Management
User Database...
ED Initiated Imports
User Defined Text
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

To create new document records:

*Select **Tools/Setup/ Global/Document Tracking** on the menu bar.*


File
Process
Tools
Help
Document Tracking
Code
Year
Description
Criteria
Automatic Request? ☐
Required for Packaging? ☐
Required for Verification? ☐
Comments
1
2
3
4
5
6
Add
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

The Document Tracking dialog box displays.

*If a document tracking record had been previously entered, you must select **Add** to enter a new record. If not, EDExpress automatically opens a new record.*

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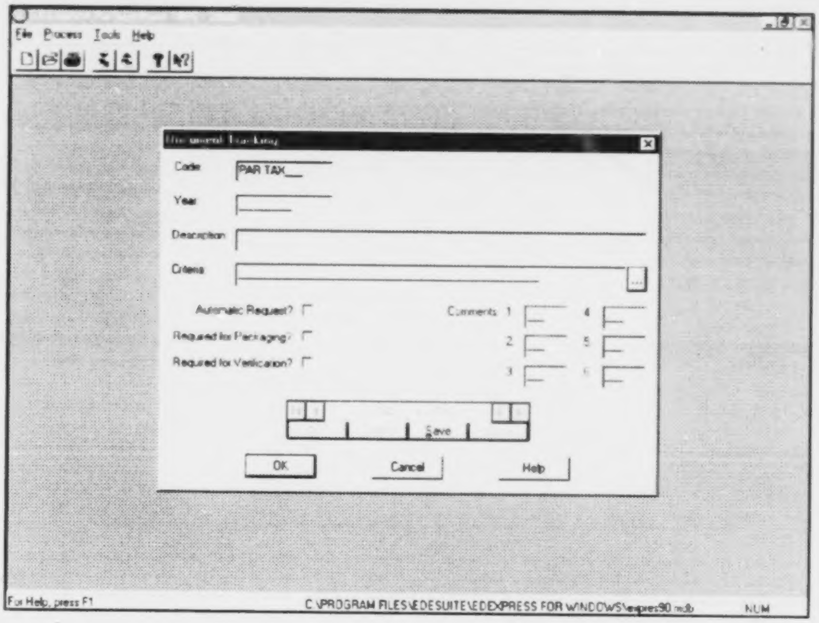
In this example, we will refer to the information on the Defining Documents Worksheet found at the beginning of the chapter.

Type a unique code of up to 10 characters to identify this document.

This code is displayed in the document tracking portion of the student's record.

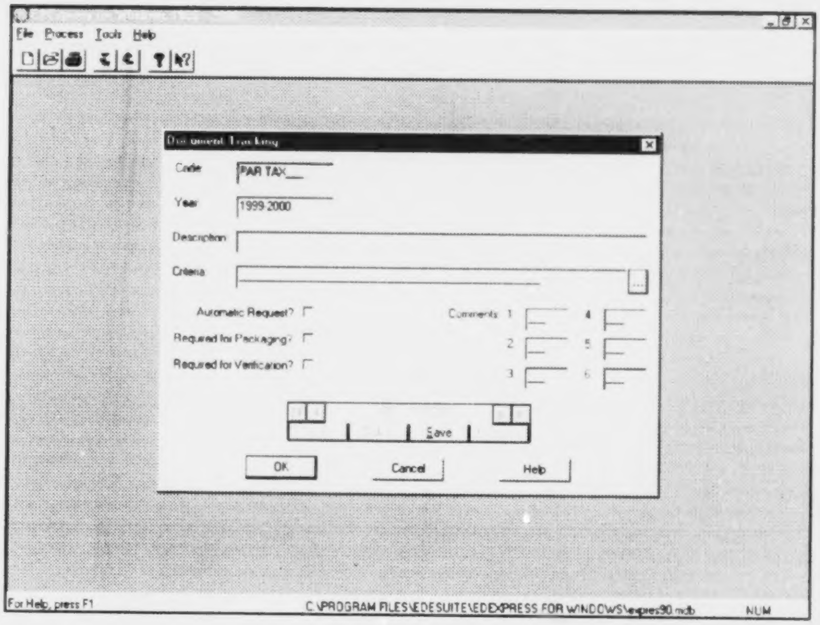
You cannot change the code after you have added the record to the database, because the code is the key to the file.



Code PAR TAX

File
Process
Tools
Help
Document Tracking
Code
Year
Description
Criteria
Automatic Request?
Required for Packaging?
Required for Verification?
Comments 1
2
3
4
5
6
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Type the award year to which this document applies (optional). This is included with the document description in the document tracking letter.

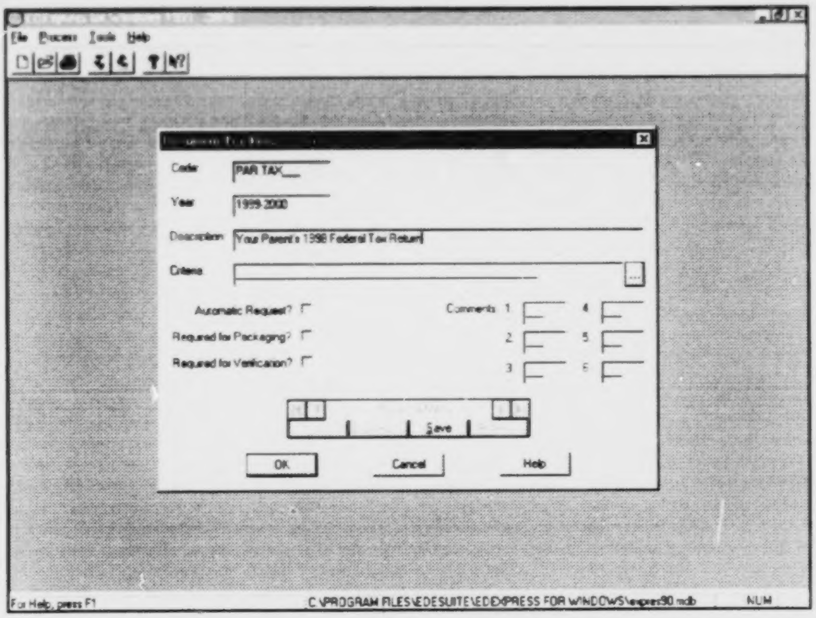


Code PAR TAX

Year 1999-2000

File
Process
Tools
Help
Document Tracking
Code
Year
Description
Criteria
Automatic Request?
Required for Packaging?
Required for Verification?
Comments 1
2
3
4
5
6
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

102 BEST COPY AVAILABLE



File Process Tools Help
OK
Cancel
Help
Save
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code: PAR TAX

Year: 1999-2000

Description: Your Parent's 1998 Federal Tax Return

Criteria:

Automatic Request? ☐

Required for Packaging? ☐

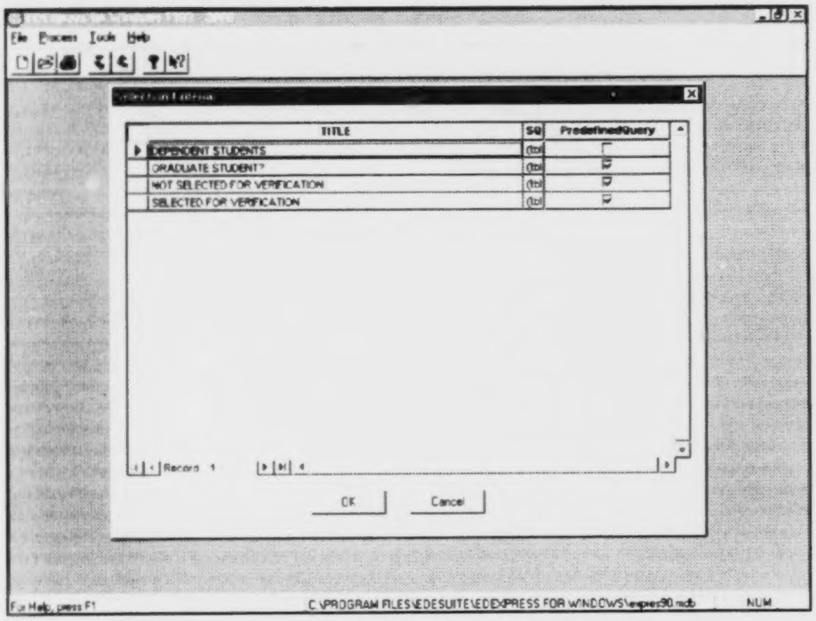
Required for Verification? ☐

Comments 1 2 3 4 5 6

Type the full description for the document you are requesting. This text appears on the document tracking letter so it should be detailed enough that a student understands what you are requesting.

To request this document from a certain group of students, use a query.

Type the query name in the Criteria field or click the ellipsis button next to the Criteria field.



File Process Tools Help
Record 1
OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

TITLE	SQ	PredefinedQuery
DEPENDENT STUDENTS	(tbl	☐
GRADUATE STUDENT?	(tbl	☑
NOT SELECTED FOR VERIFICATION	(tbl	☑
SELECTED FOR VERIFICATION	(tbl	☑

If you click the ellipsis button, a list of all the queries in your database will display.

Click the query you wish to select and click ***OK***

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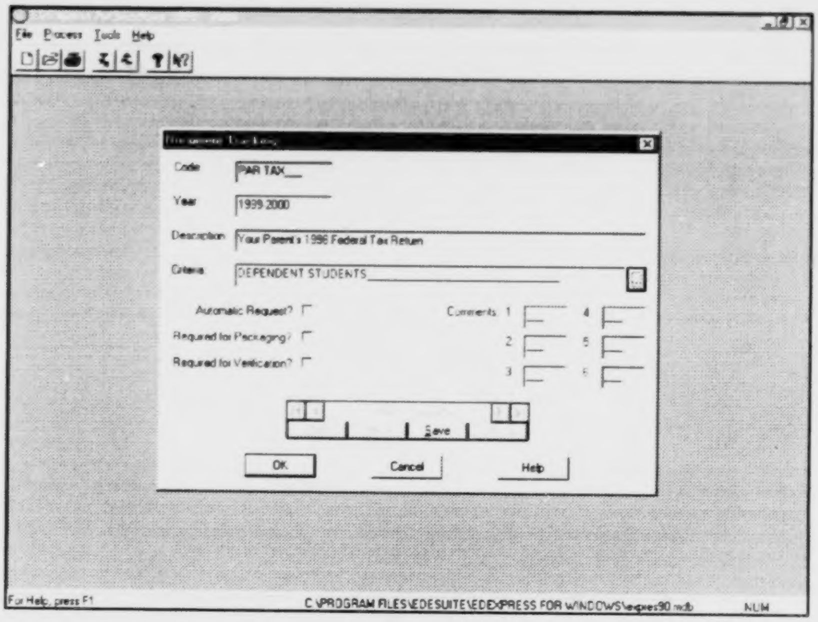
Note:

The queries displayed in this example are in the App Express Query setup.

The title of the query you select is displayed in the Criteria box.



File Process Tools Help
Document Tracking
OK
Cancel
Help
Save
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

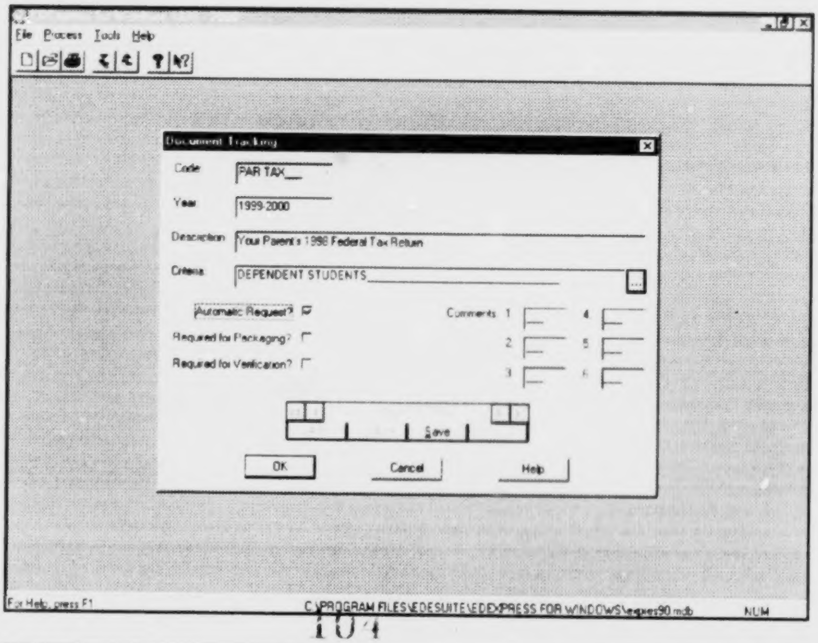
Code: PAR TAX
Year: 1999-2000
Description: Your Parent's 1998 Federal Tax Return
Criteria: DEPENDENT STUDENTS
Automatic Request? ☐
Required for Packaging? ☐
Required for Verification? ☐
Comments 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐

Tip:

You can create a query in App Express for dependency status and verification selection to apply to tax forms and the verification form.

Finally, determine if you will:

- *automatically request this document from all students.*
- *require this document to be received before the record can be packaged.*
- *require this document if the student has been selected for verification.*
- *request from students with a specific comment.*



File Process Tools Help
Document Tracking
OK
Cancel
Help
Save
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code: PAR TAX
Year: 1999-2000
Description: Your Parent's 1998 Federal Tax Return
Criteria: DEPENDENT STUDENTS
Automatic Request? ☑
Required for Packaging? ☐
Required for Verification? ☐
Comments 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐

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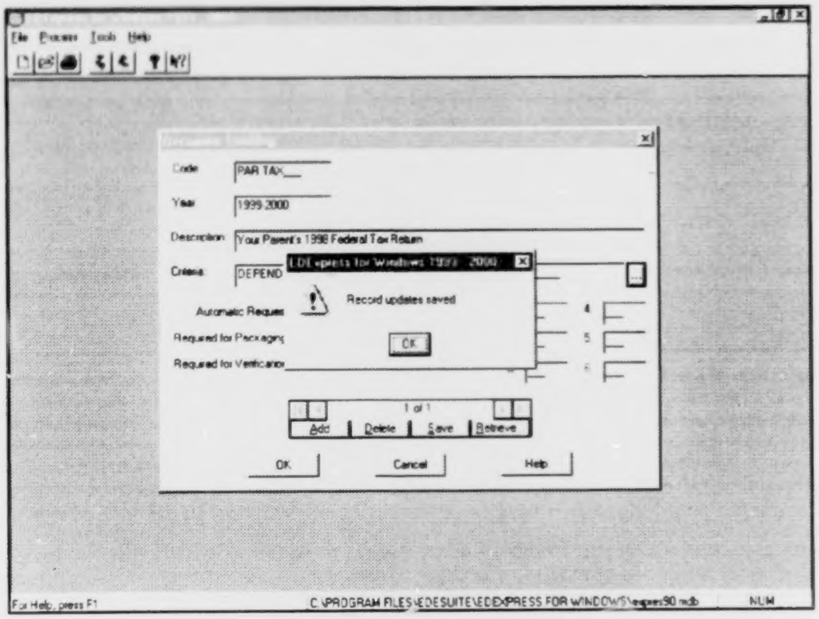

File Process Tools Help
Add
Delete
Save
Retrieve
1 of 1
OK
Cancel
Help
For Help, press F1
NUM

Code: PAR TAX

Year: 1999-2000

Description: Your Parent's 1998 Federal Tax Return

Criteria: DEPEND

EDExpress for Windows 1999 - 2000

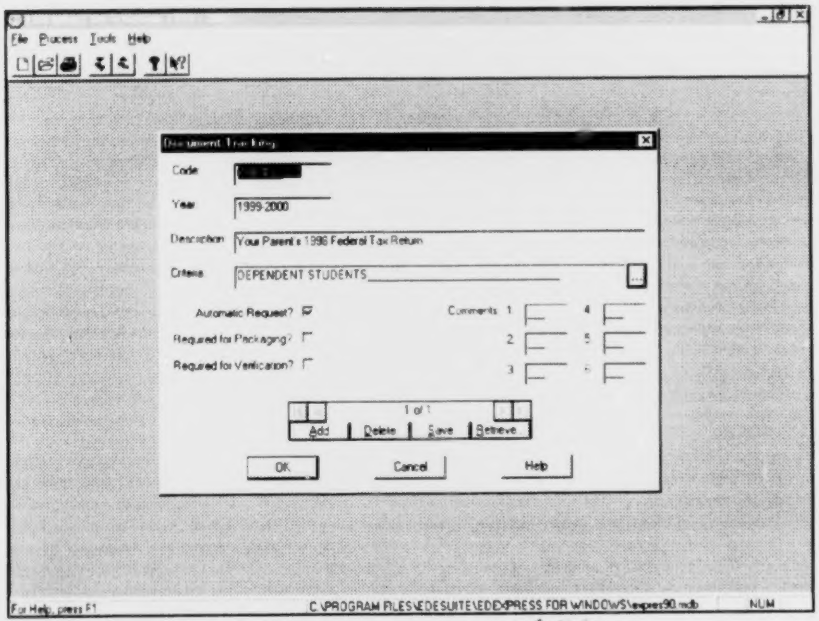
Record updates saved

OK

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Click **Save** to save the record.*

*Click **OK** to continue.*


File Process Tools Help
Document Tracking
Comments 1 2 3 4 5 6
Add
Delete
Save
Retrieve
1 of 1
OK
Cancel
Help
For Help, press F1
NUM

Code: [illegible]

Year: 1999-2000

Description: Your Parent's 1998 Federal Tax Return

Criteria: DEPENDENT STUDENTS

Automatic Request? ☑

Required for Packaging? ☐

Required for Verification? ☐

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

This is an example of a record that has been requested of students who meet the criteria in the Query when you run the Add Documents process.

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Tip:

If you are entering a document tracking record and decide to cancel your entries and start over, click **Cancel** *to close the Document Tracking dialog box. Select* **Document Tracking** *from the Setup menu again, click* **Add**, *and enter the new record.*

Tips for Successful Document Definition:

1. *Use the "Required for Packaging" flag only if you want to require the document to be received before the packaging process can be executed.*
2. *The "Required for Verification" flag posts the document to all students records who are selected for verification. For example, you may want to set this flag for a verification form, but you may not want to use it for a parent's tax return if your population includes independent students; the document will be requested regardless of dependency status.*
3. *Use Automatic Request for documents that you want the system to assign for you when you run the Add Documents process. The system will assign the document to all records that meet the criteria.*
4. *Develop queries to target a specific population.*

    Example:

    To request a tax form from a student selected for verification, create a query as follows:

    Dependency Status = D And Verification = Yes

5. *The Award tab only displays awarded funds, not disbursed funds. If you need to track a document required for disbursement (such as an entrance interview form), use selection criteria to print a list of students with the required form still outstanding to compare to your disbursement system. Another option is to use the external export function described in Appendix B.*

Adding Documents

You can add documents to student records in three ways:

- **Add Document** option on the Process menu which assigns the documents you created in Document Tracking setup.
- **Manual entry** by using the Docs tab in the student's record.
- **Multiple Entry** which allows you to add a document to a student's record and update the status of the document.

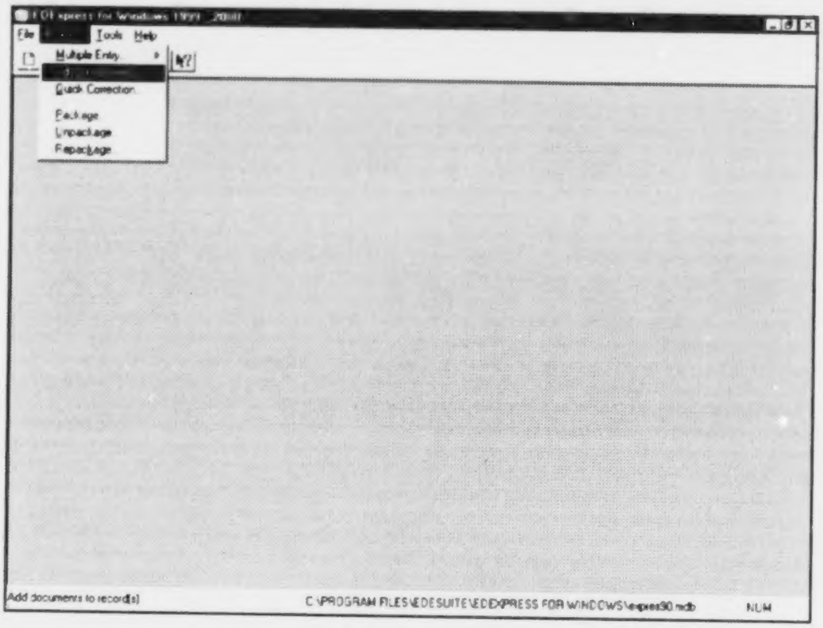
The following illustrations demonstrate the Add Document option and the manual entry.

Add Documents Option

Each time you select the Add Documents option in the Process menu, EDExpress assigns documents to each student in your database according to the criteria that you specified for each document when you set up Document Tracking.

To keep document assignments current, you must run Add Documents after every ISIR import. This process does not delete any existing assignments and does not change an "R" (received) or "W" (waived status) to "N" (not received).

*Select **Process/Add Documents** on the menu bar.*



Add documents to record(s)

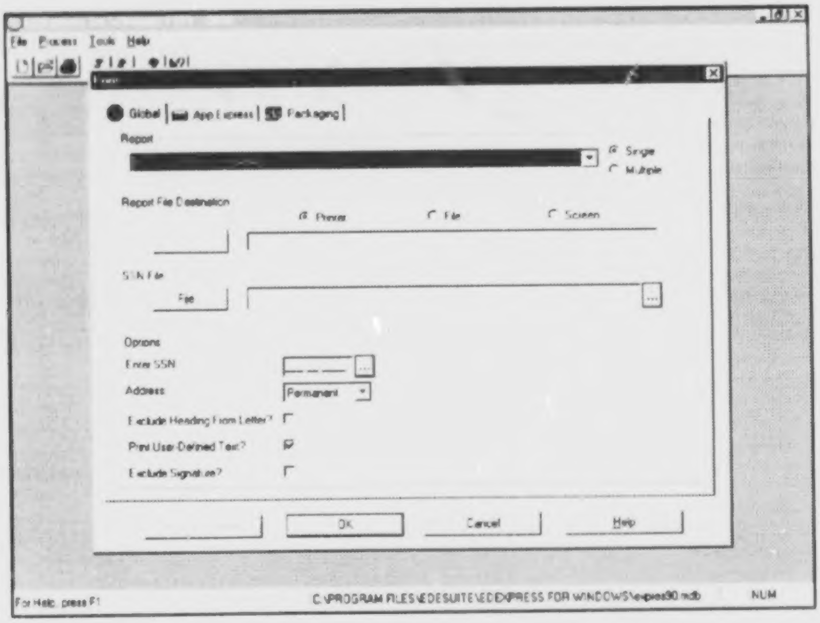
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

NUM

If a document is assigned to a student and you decide you don't want to receive that kind of document from the student, you must either go to the Docs tab in the student's record and waive the document or use the Multiple Entry, Global option to update it to W. Do not delete the document because the next time you use Add Documents, EDExpress adds the document to the student's record again.

Document Tracking List

Once you have added documents to a group of students, you may want to review which documents have been requested and each document's status. Using the Print function, you can create lists of tracking documents by student and document code.


File Process Tools Help
Global
App Express
Packaging
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb
NUM

Report
● Single
○ Multiple

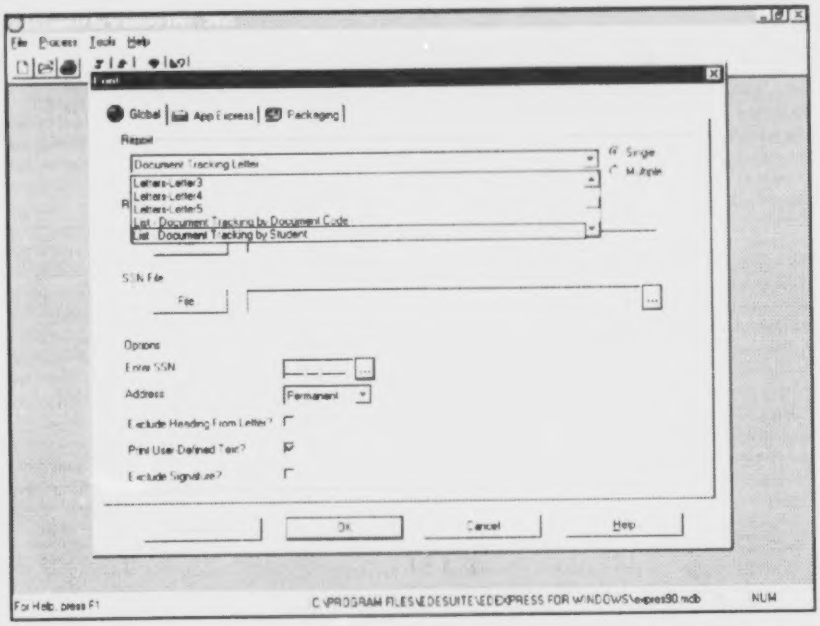
Report File Destination
● Printer ○ File ○ Screen

SSN File

Options
Enter SSN
Address: Permanent
Exclude Heading From Letter? ☐
Print User-Defined Text? ☑
Exclude Signature? ☐

Select **File/Print** on the menu.

Click the **Global** tab.


File Process Tools Help
Global
App Express
Packaging
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb
NUM

Report
Document Tracking Letter
Letters-Letter3
Letters-Letter4
Letters-Letter5
List - Document Tracking by Document Code
List - Document Tracking by Student
● Single
○ Multiple

SSN File

Options
Enter SSN
Address: Permanent
Exclude Heading From Letter? ☐
Print User-Defined Text? ☑
Exclude Signature? ☐

Select the report **List-Document Tracking by Student**.

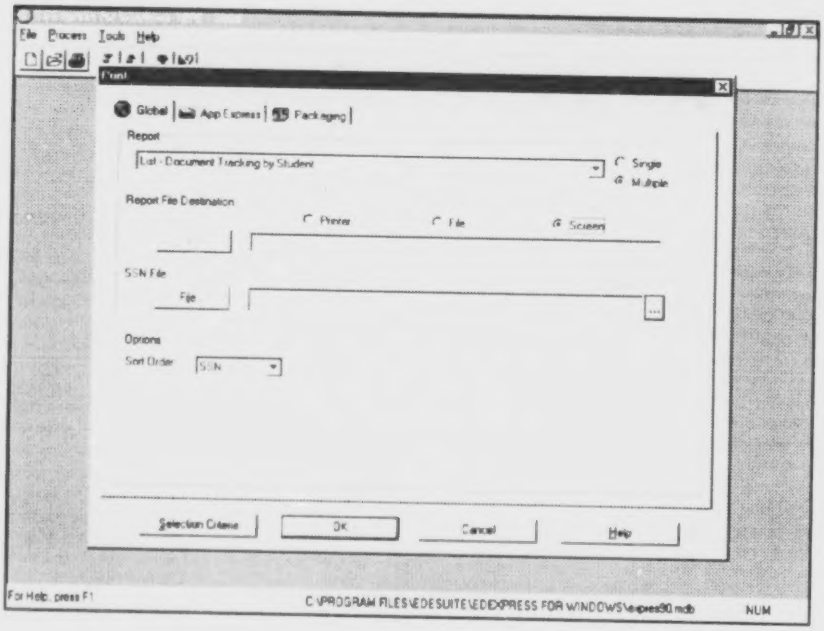
Click **Multiple** to include more than one student.

Click **Screen** to view on screen.

Click the **File** button in the SSN file box to locate an SSN file you have created.

Click the **down arrow** in the Sort Order box. Select Last Name Order to list records by last name or select SSN Order to list records in SSN order.

Click **OK**.


File
Process
Tools
Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Report: List - Document Tracking by Student

○ Single
● Multiple

Report File Destination

○ Printer ○ File ● Screen

SSN File

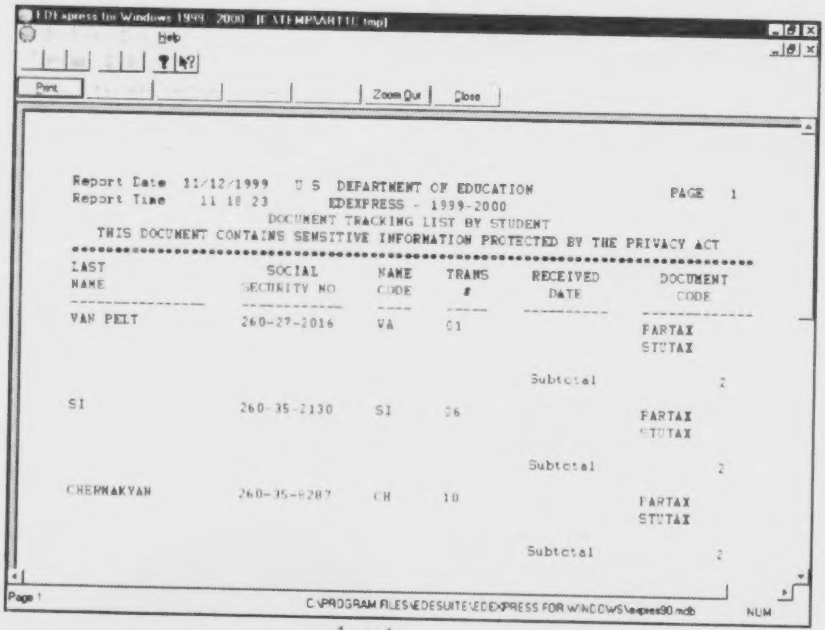
File

Options

Sort Order: SSN

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Documents are listed for each student in the database.


EDExpress for Windows 1999 - 2000 - [E:\TEMP\ARTTC.tmp]
Help
Print
Zoom Out
Close
Page 1
NUM

```
Report Date  11/12/1999   U S  DEPARTMENT OF EDUCATION                PAGE   1
Report Time    11 18 23         EDEXPRESS - 1999-2000
                         DOCUMENT TRACKING LIST BY STUDENT
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
**************************************************************************
LAST                   SOCIAL        NAME   TRANS   RECEIVED    DOCUMENT
NAME               SECURITY NO       CODE     #       DATE        CODE
----------------   ------------      ----   -----  ----------  ------------
VAN PELT           260-27-2016       VA      01
                                                               FARTAX
                                                               STUTAX

                                                   Subtotal              2

SI                 260-35-2130       SI      06
                                                               FARTAX
                                                               STUTAX

                                                   Subtotal              2

CHERNAKYAN         260-35-8287       CH      10
                                                               FARTAX
                                                               STUTAX

                                                   Subtotal              2
```

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

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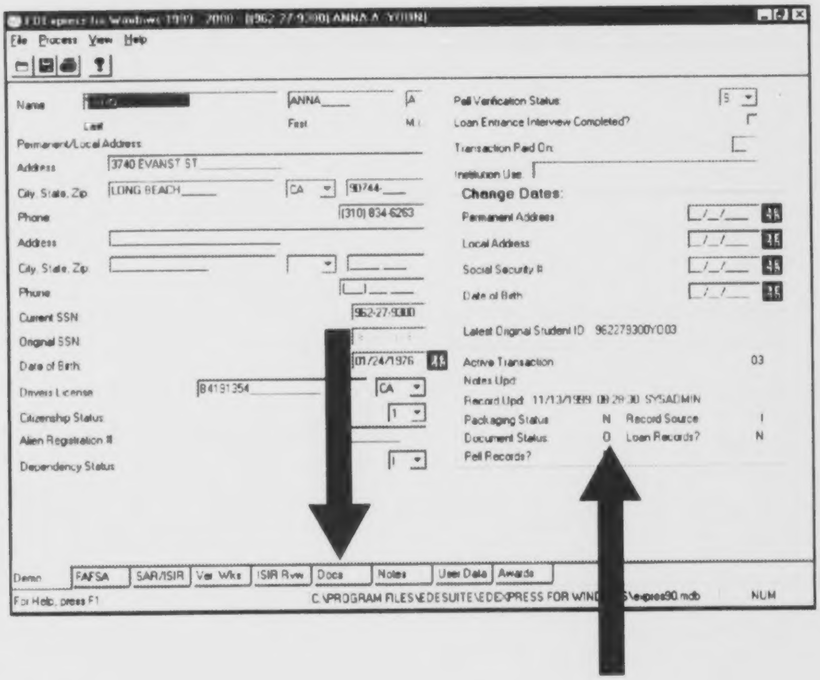
Manual Entry or Update

In manual entry, which is the second method of updating a student's record, you simply open a student record and modify data on the Docs tab.



Name [redacted] ANNA A
Last First M.I.
Permanent/Local Address
Address 3740 EVANST ST
City, State, Zip LONG BEACH CA 90744-
Phone (310) 834-6263
Address
City, State, Zip
Phone
Current SSN 962-27-9300
Original SSN
Date of Birth 01/24/1976
Drivers License B4191354 CA
Citizenship Status 1
Alien Registration #
Dependency Status I

Pell Verification Status S
Loan Entrance Interview Completed? ☐
Transaction Paid On:
Institution Use:

Change Dates:
Permanent Address __/__/____
Local Address __/__/____
Social Security # __/__/____
Date of Birth __/__/____

Latest Original Student ID 962279300YO03
Active Transaction 03
Notes Upd:
Record Upd: 11/13/1999 09:29:30 SYSADMIN
Packaging Status N Record Source I
Document Status O Loan Records? N
Pell Records?

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WIND S\expres90.mdb

From the open Demo tab, note the document status of O. Click the ***Docs*** *tab.*

Document Status

This field displays the student's document status on the Demo tab. If you need to modify this status, click on the Docs tab at the bottom of the screen.

B = Documents still needed for both packaging and verification
C = All documents are satisfied including documents required for both Packaging and verification
V = Documents still needed for verification
P = Documents still needed for packaging
O = Other documents needed but not required for packaging or verification
Blank = Status not determined

111

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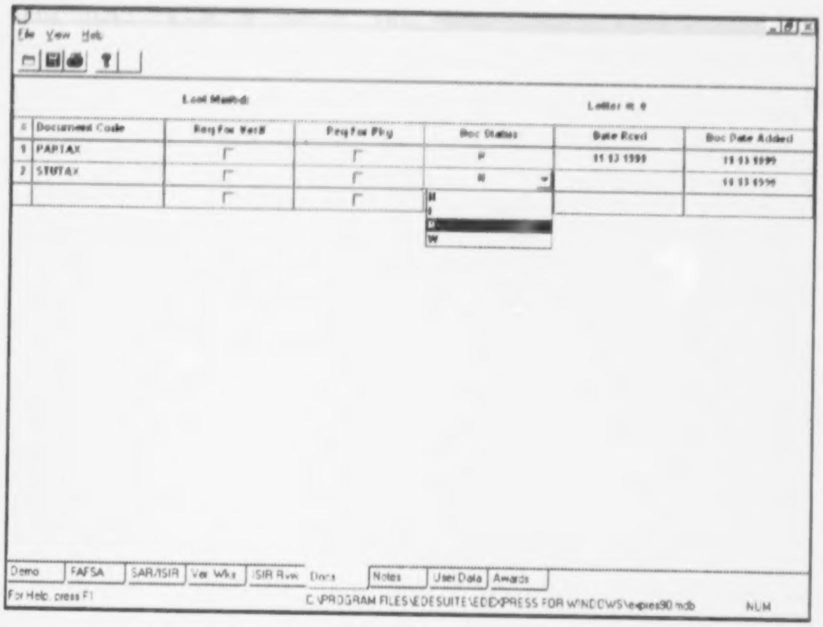
In this example, tax returns for both the parent and student have been requested. You may add or modify any document records.

In this example, we are recording the document that was received on 11/13/1999.



Last Mailed:

Letter #: 0

#	Document Code	Req For Verif	Req For Pkg	Doc Status	Date Rcvd	Doc Date Added
1	PAPTAX	☐	☐	R	11/13/1999	11/13/1999
2	STUTAX	☐	☐	N N I R W		11/13/1999
		☐	☐			

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

NUM

Document Status Codes

Every document has an indicated status.

N = Needed

I = Incomplete

R = Received

W = Waived

If you use the Add Documents option and you want documents posted accurately, part of your data management job is to update the status of each document.

Every time you run the Add Documents process, EDExpress looks at each ISIR transaction to determine which documents must be added to a student's record. Therefore, the wrong documents may be added when fields that are used in the queries for adding these documents are changed from ISIR to ISIR.

You must update the status of any document that should not have been added to "W" (waived). Deleting the document won't work because EDExpress will add it to the record again the next time you run Add Documents.

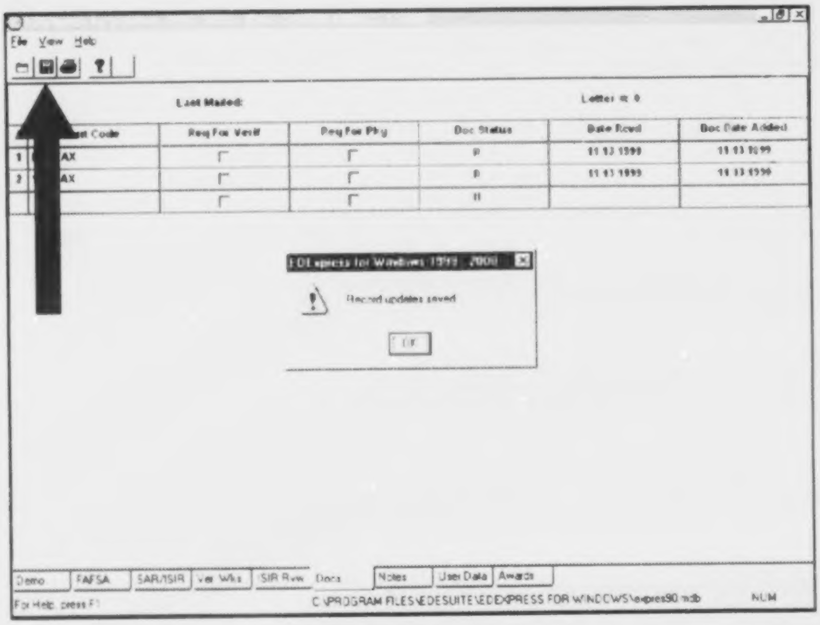
Tip:

During the Add Documents process, EDExpress looks only at the demographic record for the Pell verification status to determine whether to add a document required for verification. If you do not update the Pell verification status manually for a later transaction than the one presently selected for verification or set the ***Update Demo Record*** *flag in Setup to automatically update the demo record when new information is imported for an ISIR, EDExpress does not add the document to the student record.*

Save the changes by clicking the ***Save*** *icon.*

You will also be prompted to save if you click on another tab.

Click ***OK*** *to continue.*



Last Mailed:

Letter # 0

	st Code	Req For Verif	Req For Pkg	Doc Status	Date Rcvd	Doc Date Added
1	AX	☐	☐	P	11 13 1999	11 13 1999
2	AX	☐	☐	P	11 13 1999	11 13 1999
		☐	☐	N		

EDExpress for Windows 1999 - 2000

Record updates saved

OK

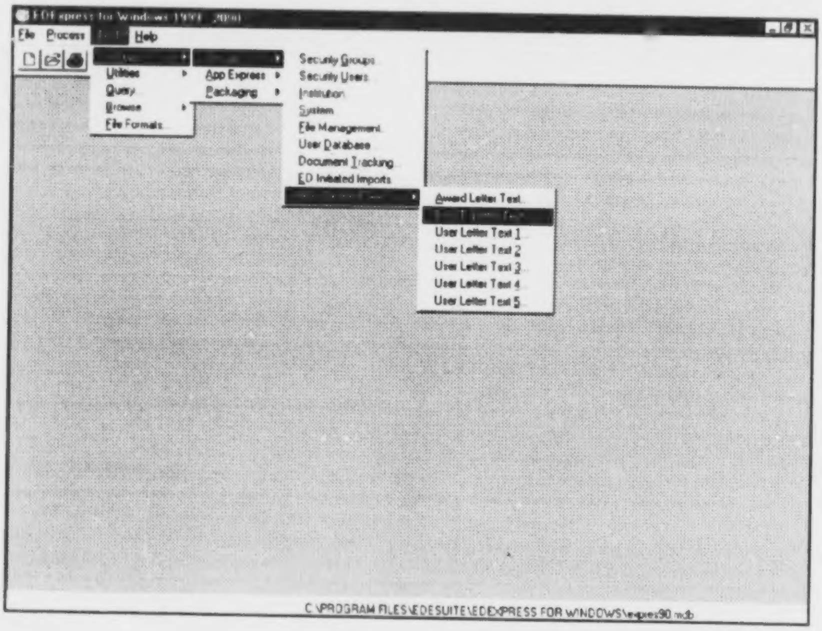
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

User Defined Document Tracking Letter Text

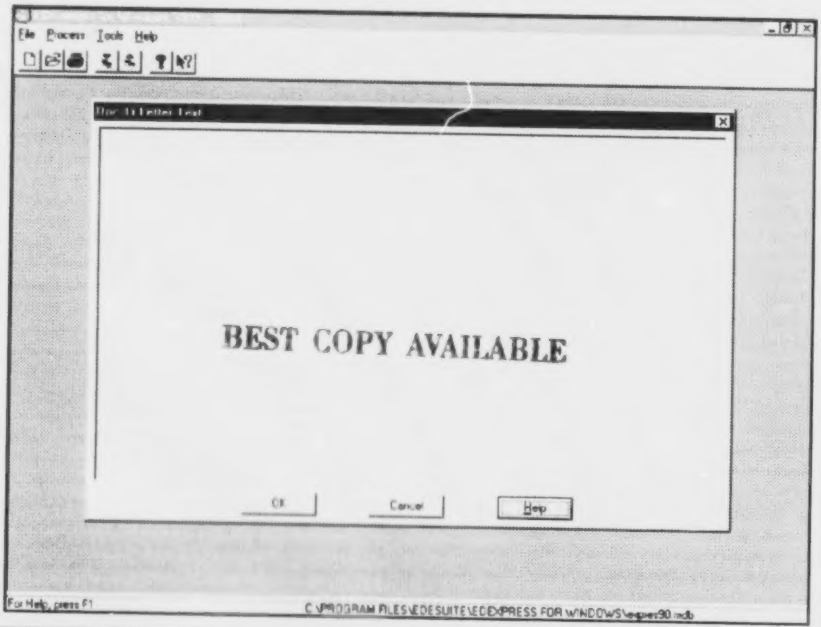
You can create your own text to use in document tracking letters you send to students.

*Select **Tools/Setup/Global/User Defined Text/Doc Tr. Letter Text** on the main menu bar.*


EDExpress for Windows 1999 - 2000
File
Process
Help
Utilities
Query
Browse
File Formats...
App Express
Packaging
Security Groups...
Security Users...
Institution...
System...
File Management...
User Database...
Document Tracking...
ED Initiated Imports
Award Letter Text...
User Letter Text 1...
User Letter Text 2...
User Letter Text 3...
User Letter Text 4...
User Letter Text 5...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Type the text for the letter.

*Click the **Help** button to see hints about formatting the text.*


File
Process
Tools
Help
Doc Tr Letter Text
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

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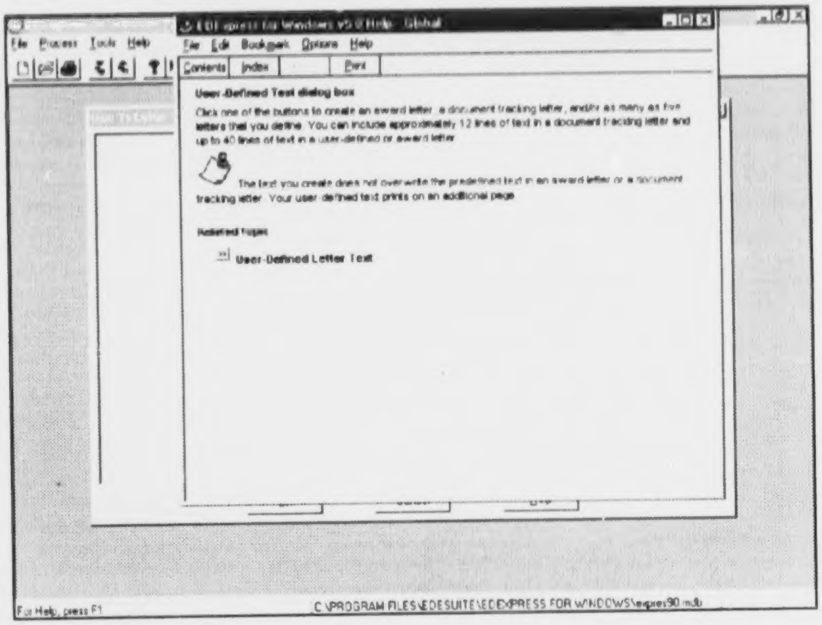

File Process Tools Help
File Edit Bookmark Options Help
Contents
Index
Print
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

User-Defined Text dialog box

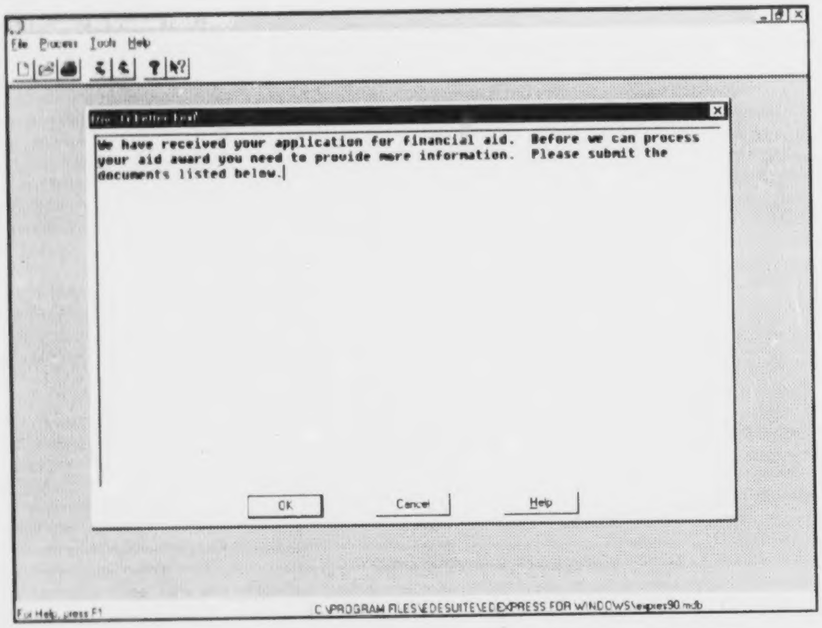
Click one of the buttons to create an award letter, a document tracking letter, and/or as many as five letters that you define. You can include approximately 12 lines of text in a document tracking letter and up to 40 lines of text in a user-defined or award letter.

The text you create does not overwrite the predefined text in an award letter or a document tracking letter. Your user-defined text prints on an additional page.

Related Topics

User-Defined Letter Text

*Click **Exit** when finished.*


File Process Tools Help
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

```
We have received your application for financial aid.  Before we can process
your aid award you need to provide more information.  Please submit the
documents listed below.
```

*Click **OK** when you have finished the letter.*

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Tips for Letter Text Entry

The letters can be up to one page in length. Insert student names and addresses and salutations using the Print option.

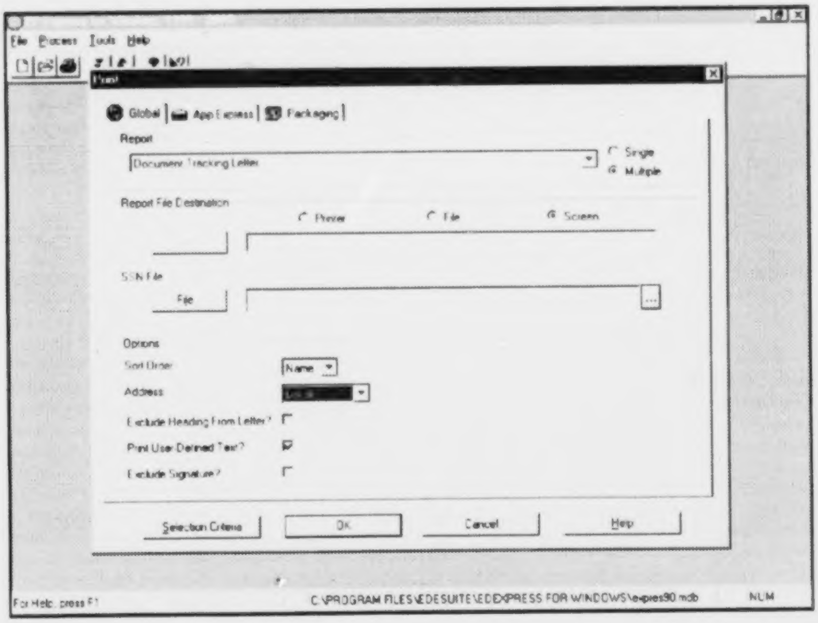
A heading prints on the first line of all letters unless you choose to exclude it in the Print dialog box. This heading does not appear in the text entry box. The student's name and address appear on the upper left side of all letters, and your institution's name and address, as well as the student ID, appear on the upper right side of all letters. The salutation "Dear Student" appears flush to the left margin below the addresses and student ID in the award and document tracking letters.

The text entry box is a simple text editor. The text automatically wraps to the next line as you type, and you can use hard returns.

- Do not use tabs.
- If you are creating an award letter or document tracking letter, leave the first line of the text entry window blank for the heading.
- For award letters, you can enter up to 40 lines of text; for document tracking letters, up to 12 lines of text; for user-defined letters, up to 42 lines of text.

Printing a Document Tracking Letter

Now you are ready to print a Document Tracking letter.


File Process Tools Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Report: Document Tracking Letter

○ Single
● Multiple

Report File Destination: ○ Printer ○ File ● Screen

SSN File

Options

Sort Order: Name

Exclude Heading From Letter? ☐

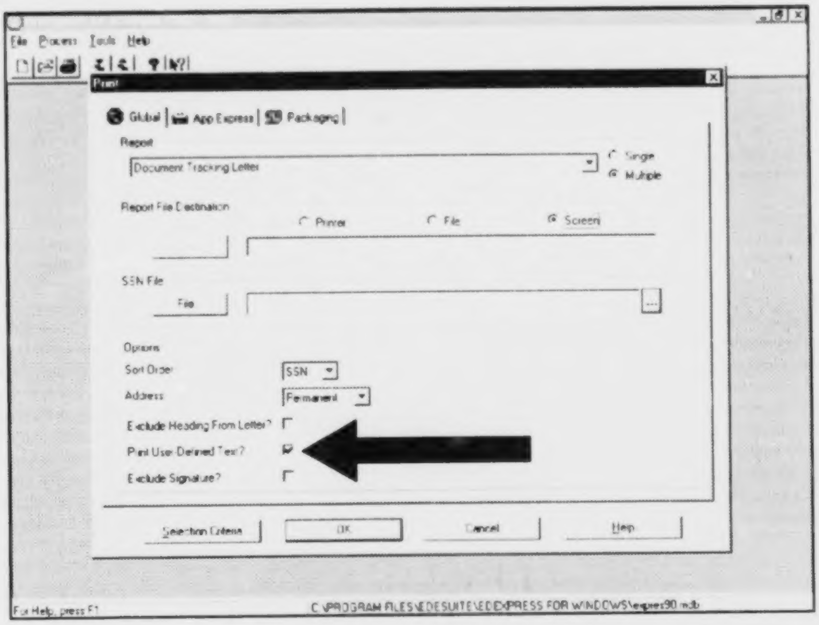
Print User Defined Text? ☑

Exclude Signature? ☐

*Select **File/Print** on the main menu bar.*

*Click the **Global** tab.*

*Select the report type **Document Tracking Letter**.*


File Process Tools Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Report: Document Tracking Letter

○ Single
● Multiple

Report File Destination: ○ Printer ○ File ● Screen

SSN File

Options

Sort Order: SSN

Address: Permanent

Exclude Heading From Letter? ☐

Print User Defined Text? ☑

Exclude Signature? ☐

*Click **Multiple** to print letters for more than one student.*

*Click **Screen** to view the letters on the screen.*

*Click the **Print User-Defined Text?** check box to include the text you created.*

*Click **OK**.*

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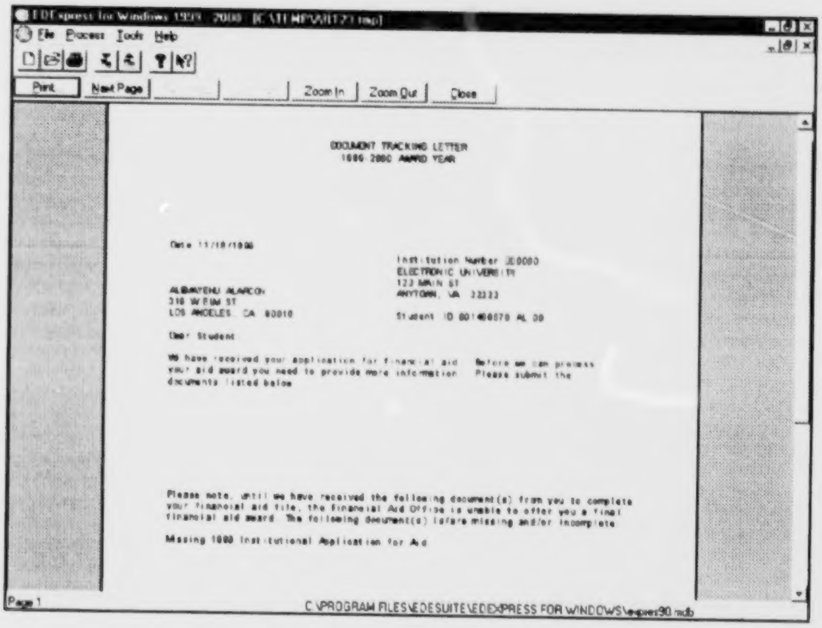
The first part of the letter includes the letter text you created.

The second part of the letter identifies the documents that are missing.


EDExpress for Windows 1999 - 2000 - [C:\TEMP\VB1723.tmp]
File
Process
Tools
Help
Print
Next Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

DOCUMENT TRACKING LETTER
1999-2000 AWARD YEAR

Date 11/18/1998

Institution Number 000000
ELECTRONIC UNIVERSITY
123 MAIN ST
ANYTOWN, VA 22222

ALEMAYEHU ALARCON
310 W ELM ST
LOS ANGELES, CA 90010

Student ID 001480070 AL 00

Dear Student

We have received your application for financial aid. Before we can process your aid award you need to provide more information. Please submit the documents listed below.

Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

Missing 1999 Institutional Application for Aid

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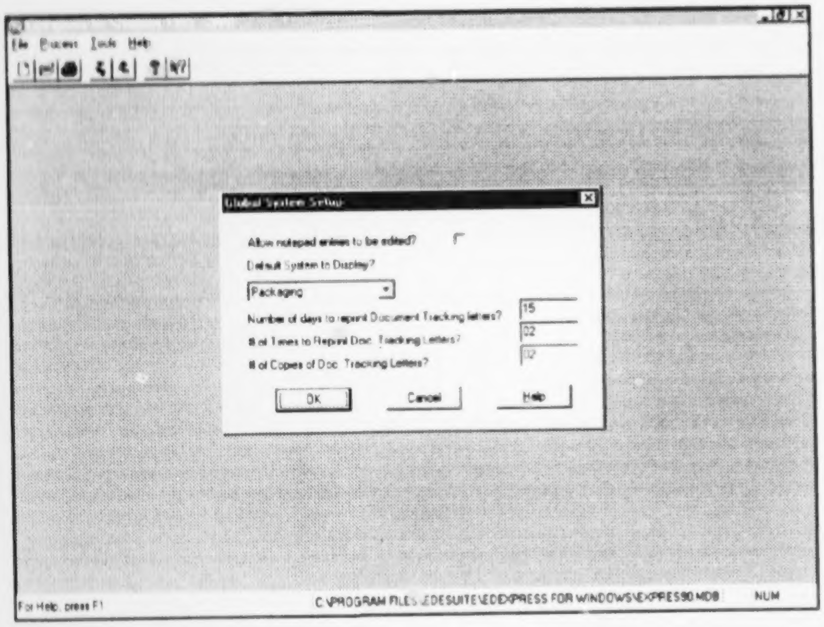
Document Print Parameters

Set the parameters for how many copies, how often and how many times you will print Document Tracking Letters.



Allow notepad entries to be edited? ☐

Default System to Display? Packaging

Number of days to reprint Document Tracking letters? 15

# of Times to Reprint Doc. Tracking Letters? 02

# of Copies of Doc. Tracking Letters? 02

*Select **Tools/Setup/ Global/System** from the menu.*

*Click the **Allow notes entries to be edited?** checkbox if you want EDExpress users to be able to create and edit Notes entries. For security reasons, you may want to disable this option so that users can only view Notes entries.*

*Click the **down arrow** in the **Default System to display?** box to choose the module you want to display first in Import, Export, and Print.*

When printing multiple tracking letters for a student, the date of printing is stored on the student's record on the Docs tab. The next time you print tracking letters, EDExpress checks to see if the number of days specified in this field has elapsed and if tracking documents are still missing. If the set number of days has elapsed and documents are still missing, EDExpress automatically prints another letter. This field is updated only when you print directly to a printer.

*In the **Number of Days to Reprint Tracking Letters?** box type the number of days to elapse before EDExpress automatically prints another letter.*

EDExpress counts the number of times you print document tracking letters for each student. The count appears on the Docs tab in each student's record. This field is updated when you print to a printer or a file.

*Use the **Number of Times to Reprint Document Tracking Letters?** box to set the maximum number of letters you want to send to a student. Valid values are 00-99. To set no maximum, type **00**.*

*Use the **Number of Document Tracking Letters to Print?** box, to set the number of letter copies you want EDExpress to print for each student each time you print document tracking letters. Valid values are 00-99. The default value is 00.*

Type the values for each field.

*Click **OK** to save.*

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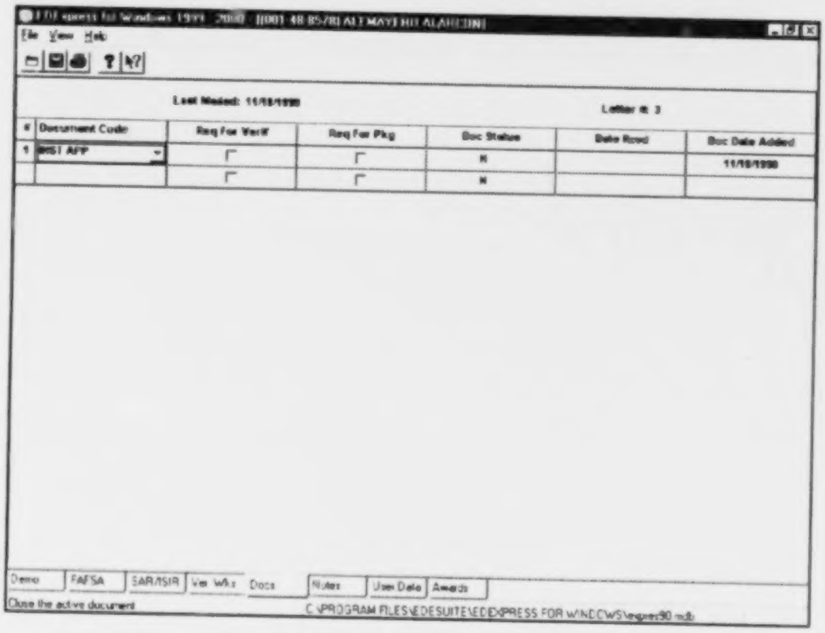
When to Print Again

When printing multiple tracking letters for a student, the date you printed is stored on the student's record on the Docs tab (also displayed on the Awards tab). The next time you print tracking letters, EDExpress checks to see if the number of days specified in this field has elapsed and if tracking documents are still missing. If the set number of days has elapsed and documents are still missing, EDExpress automatically prints another letter. This field is updated only when you print directly to a printer.

Note the last mailed date on this student's record. When will the letter be printed again if the documents are not received?



Last Mailed: 11/18/1998

Letter #: 3

#	Document Code	Req For Verif	Req For Pkg	Doc Status	Date Recvd	Doc Date Added
1	BIST APP	☐	☐	M		11/18/1998
		☐	☐	M		

Close the active document

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Apply What You Know

In the exercises, you will create the following documents:

- Student's Tax Return
- Parent's Tax Return
- Promissory Note

Create the Records

- From the main menu select **Tools/Setup/Global/Document Tracking**.
- Select **Add** to create a new record.
- Type the document **Code**.
- Type the **Priority**.
- Type the applicable **Year**.
- Type the **Description**.
- Select a query, if applicable.
- Check other questions, if applicable.
- When complete, click **Save**.

Create a Query

Dependent students in either VA or MD that have submitted all of their required documents.

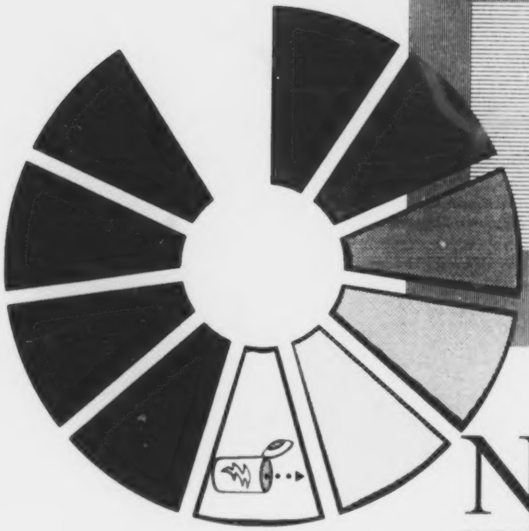
To review steps on how to create a query, see page 2-26.

Discussion Questions for Chapter 5

1. How do you create a new document?
2. Are documents posted automatically to all student records?
3. Why would you want to track whether a student has submitted a document?
4. How would you define a document to be requested of all students?
5. What tool do you use to apply specific criteria to a record?
6. What are the three methods for updating the Docs tab?

Chapter 6

ISIR Import Into Packaging



Now that you have completed all of the setup activities that affect the creation of a packaging record, you are ready to create some records. There are three ways to create a packaging record: manual entry, ISIR Import, and External Import. If ISIR data is present in your EDExpress database, the ISIR import is the most efficient way to create packaging records. Thus, in this chapter you learn how to use the ISIR Import feature to create packaging records.

6 ISIR Import Into Packaging

Objectives

1. Learn the ISIR Import procedure for creating new packaging records.
2. Identify record updates based on setup entry.
3. Identify the components of the Awards tab:
    - Status Information
    - Miscellaneous
    - Record status
    - Needs Analysis

ISIR Import

Importing ISIRs

The Import function takes data from the existing EDExpress for Windows ISIR database and uses it to create an associated record in the Packaging database.

EDExpress imports into Packaging only ISIR records that contain valid EFC calculations (no rejects). The ISIR data with the active transaction number is the record imported. It does not import duplicate records. Duplicates are those records that have the same trankey (SSN, name identifier, and transaction number) as another record already in the database. You can import subsequent ISIR transactions for a student as long as the record has not been packaged.

The packaging module of EDExpress calculates several fields in the packaging records when it imports them:

- **Budget Code** is determined based on the budget criteria and the budget priority that the student meets.
- **Student Budget** is calculated based on the budget code.
- **Enrollment Terms** are based on the academic profile you select for the import.
- **EFC** is calculated using the number of months indicated in the academic year profile.
- **Unmet Need**
- **Remaining Need**
- **Pell EFC**
- **Estimated Pell Award** if the student has an eligible EFC.
- **Packaging Status** set to R (ready to package) if all documents required for packaging are present or the documents are not required for packaging. Packaging status is N (not ready to package) if documents required for packaging are not present.
- **Ready Date** is set to Date of Import if packaging status is R (ready to package).

Note:

EDExpress allows you to select an active transaction if a student has more than one ISIR. If an active transaction has not been selected (using the ISIR Review tab) the ISIR with the highest transaction number is selected.

---

6 ISIR Import Into Packaging

Import ISIRs

This method of adding records to Packaging assumes that you have already received processed ISIRs and imported those into EDExpress—Application Processing.

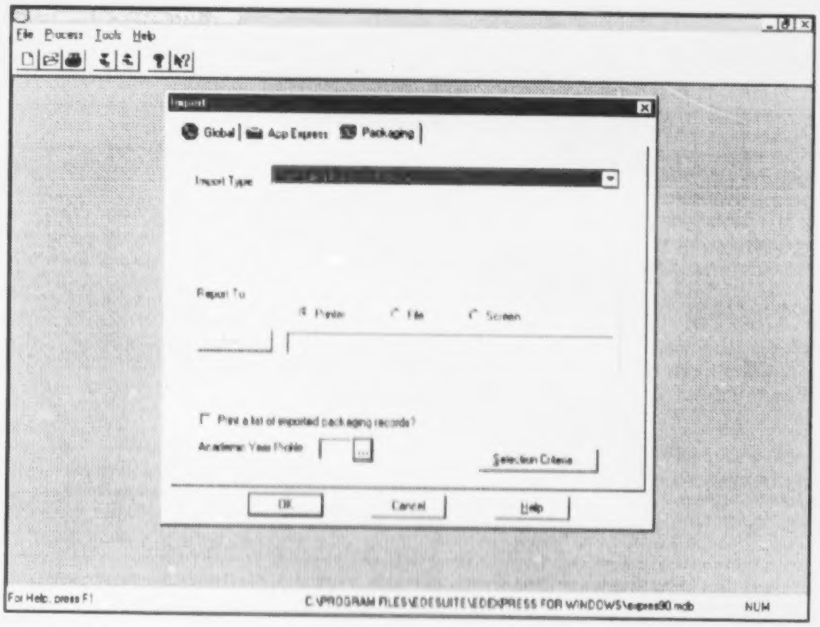
To begin, we will import ISIR data that is already stored in EDExpress Apps Processing. The data will go into the packaging module and create new packaging records:

*Select **File/Import** on the menu bar.*

*Click the **Packaging** tab.*

*Click the **down** arrow on the **Import Type** field to display a list of file types to import.*

*Select **ISIR Data.***


File Process Tools Help
Import
Global
App Express
Packaging
Import Type
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Report To ● Printer ○ File ○ Screen

☐ Print a list of imported packaging records?

Academic Year Profile

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb

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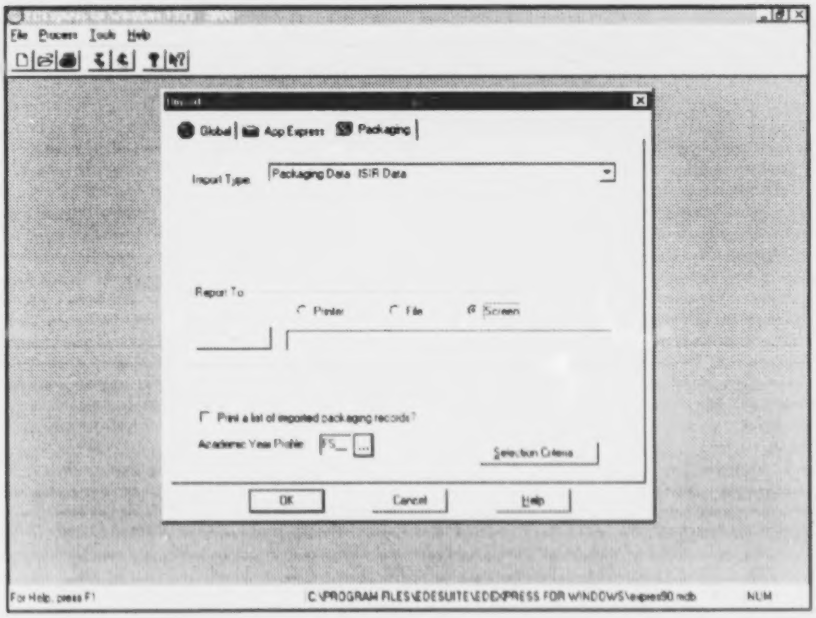

File Process Tools Help
Import
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Import Type: Packaging Data ISIR Data

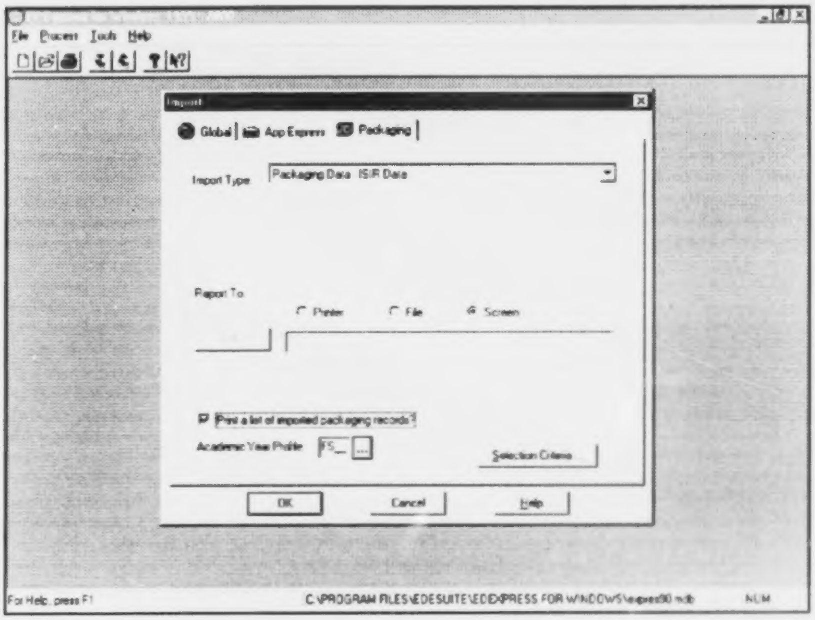
Report To: ○ Printer ○ File ● Screen

☐ Print a list of imported packaging records?

Academic Year Profile: FS_

Click **Printer**, **File**, or **Screen** as the output destination.

Type the academic year profile code you want to use if you know it, or click the ellipsis (...) button to display a list of codes to select from. (These are the codes you predefined in setup.)


File Process Tools Help
Import
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Import Type: Packaging Data ISIR Data

Report To: ○ Printer ○ File ● Screen

☑ Print a list of imported packaging records?

Academic Year Profile: FS_

Click **Print a List of Imported Packaging Records?** to print a list of the records added at the conclusion of the import.

Click the **Selection Criteria** button to specify the group of records to import.

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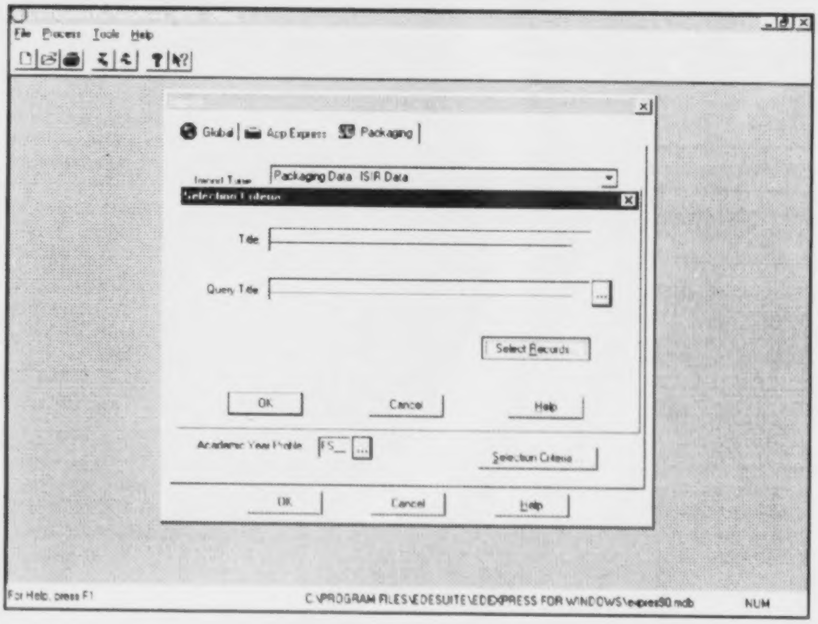
ISIR Import Into Packaging

*Click the **Select Records** button to select specific records from a list.*


File Process Tools Help
Global
App Express
Packaging
Selection Criteria
Title
Query Title
Select Records
OK
Cancel
Help
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

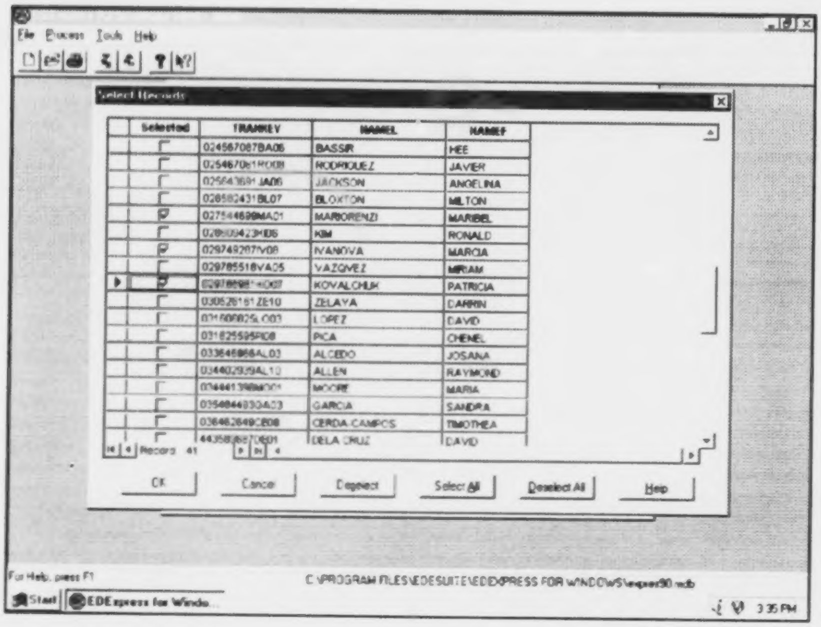
Import Type: Packaging Data ISIR Data

Academic Year Profile: FS_

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Mark the boxes of those records you want to import.

*Click **OK** when finished.*


File Process Tools Help
Select Records
Record: 41
OK
Cancel
Deselect
Select All
Deselect All
Help
For Help, press F1
Start
EDExpress for Windo...
3:35 PM

	Selected	TRANKEY	NAMEL	NAMEF
	☐	024567087BA06	BASSIR	HEE
	☐	[illegible]	RODRIGUEZ	JAVIER
	☐	[illegible]	JACKSON	ANGELINA
	☐	028582431BL07	BLOXTON	MILTON
	☑	[illegible]	MARIORENZI	MARIBEL
	☐	[illegible]	KIM	RONALD
	☑	029749207IV08	IVANOVA	MARCIA
	☐	029785518VA05	VAZQUEZ	MIRIAM
▶	☑	[illegible]	KOVALCHUK	PATRICIA
	☐	[illegible]	ZELAYA	DARRIN
	☐	[illegible]	LOPEZ	DAVID
	☐	031825595PI08	PICA	CHENEL
	☐	033646866AL03	ALCEDO	JOSANA
	☐	[illegible]	ALLEN	RAYMOND
	☐	[illegible]	MOORE	MARIA
	☐	[illegible]	GARCIA	SANDRA
	☐	036462649CE08	CERDA CAMPOS	TIMOTHEA
	☐	[illegible]	DELA CRUZ	DAVID

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

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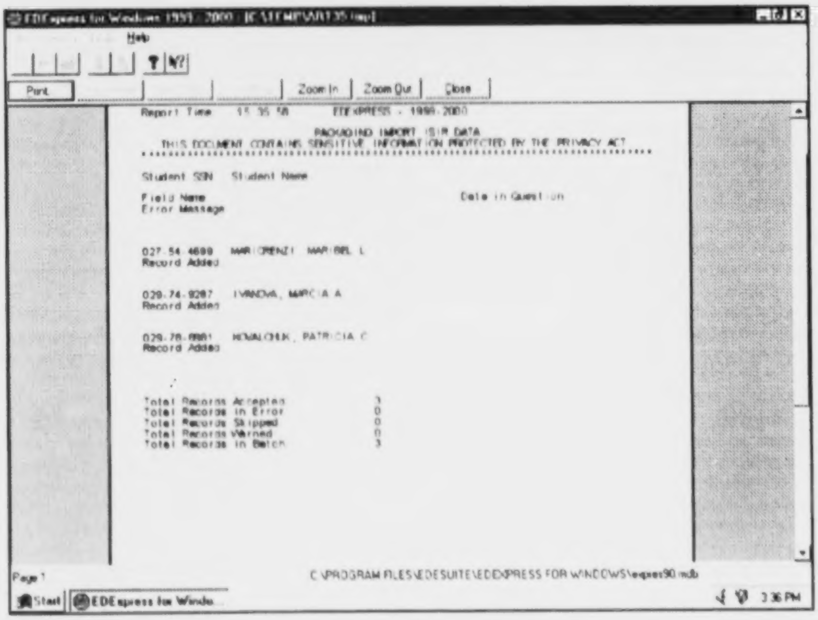
EDExpress for Windows 1999 - 2000 - [C:\TEMP\AR135.tmp]
Help
Print
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
Start
EDExpress for Windo...
3:36 PM

```
Report Time    15:35:58       EDEXPRESS - 1999-2000

                    PACKAGING IMPORT ISIR DATA
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*************************************************************************

Student SSN   Student Name

Field Name                                        Data in Question
Error Message


027-54-4699   MARICRENZI, MARIBEL L
Record Added

029-74-9287   IVANOVA, MARCIA A
Record Added

029-78-8881   KOWALCHUK, PATRICIA C
Record Added


Total Records Accepted          3
Total Records in Error          0
Total Records Skipped           0
Total Records Warned            0
Total Records in Batch          3
```

The edit report shows all records included in the import process and indicates that they were added or rejected and for what reason.

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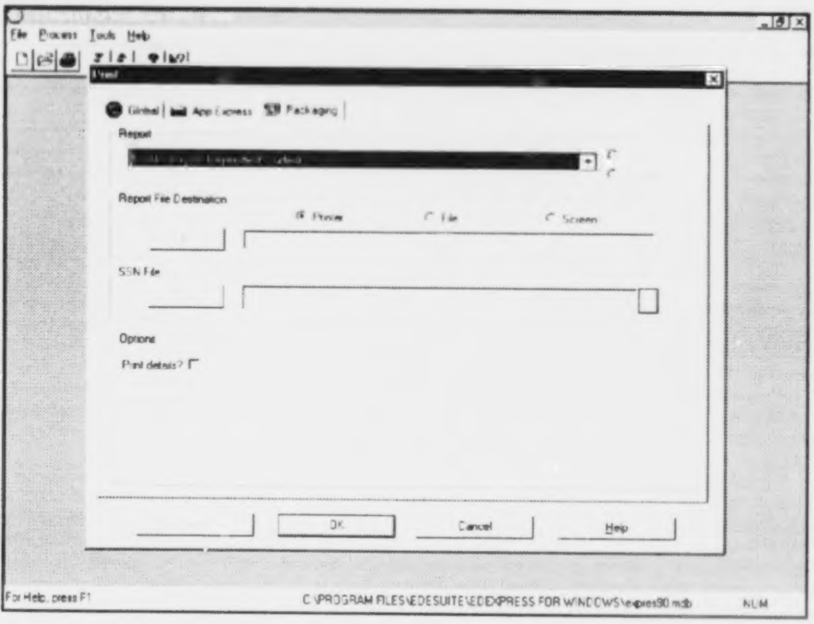
Print a List of Unpackaged Records

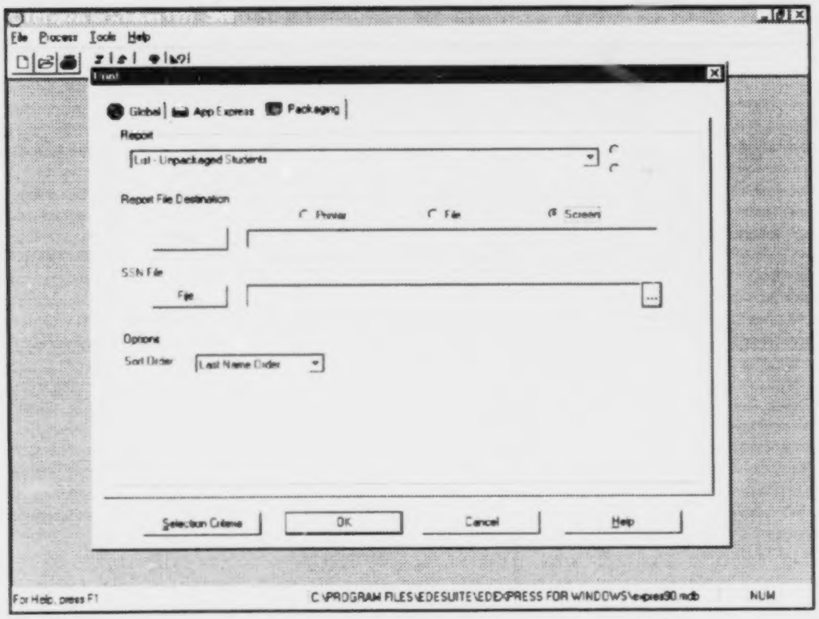
In addition to the list provided during the import process you may want to review other records that are on the database that have not yet been packaged. You may have created records in packaging using manual entry or external import. EDExpress provides a list format for unpackaged records.

*To print a list of unpackaged students, select **File/Print** on the menu bar.*

*Click the **Packaging** tab*


File
Process
Tools
Help
Print
Global
App Express
Packaging
Report
Report File Destination
● Printer
○ File
○ Screen
SSN File
Options
Print details? ☐
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

BEST COPY AVAILABLE


File Process Tools Help
Print
Global
App Express
Packaging
Report File Destination
SSN File
File
Options
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Report: List - Unpackaged Students

Report File Destination: ○ Printer ○ File ● Screen

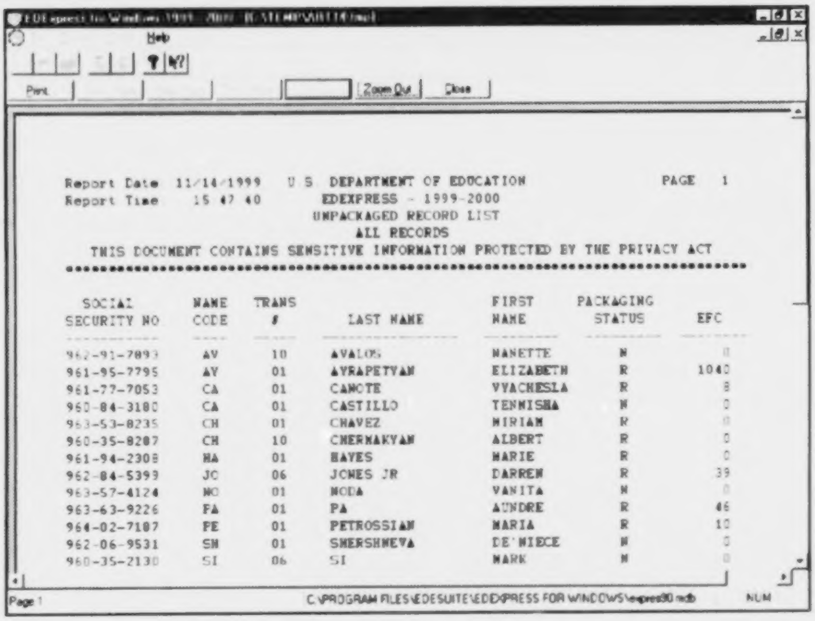
Sort Order: Last Name Order

Use the down arrow in the **Report** field to select ***List - Unpackaged Students***.

Select a **Report Destination**.

Select a **Sort Order**.

Click **OK**.


Help
Print
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

```
Report Date  11/14/1999   U S  DEPARTMENT OF EDUCATION            PAGE   1
Report Time     15 47 40        EDEXPRESS - 1999-2000
                               UNPACKAGED RECORD LIST
                                    ALL RECORDS
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****************************************************************************

   SOCIAL       NAME   TRANS                     FIRST      PACKAGING
SECURITY NO     CODE     #       LAST NAME       NAME        STATUS      EFC
-----------     ----   -----   -------------   ---------   ---------   -----
962-91-7893      AV     10     AVALOS          NANETTE         N           0
961-95-7795      AV     01     AYRAPETYAN      ELIZABETH       R        1040
961-77-7053      CA     01     CANOTE          VYACHESLA       R           8
960-84-3180      CA     01     CASTILLO        TENNISHA        N           0
963-53-8235      CH     01     CHAVEZ          MIRIAM          R           0
960-35-8287      CH     10     CHERNAKYAN      ALBERT          R           0
961-94-2308      HA     01     HAYES           MARIE           R           0
962-84-5399      JC     06     JONES JR        DARREN          R          39
963-57-4124      NO     01     NODA            VANITA          N           0
963-63-9226      PA     01     PA              AUNDRE          R          46
964-02-7187      PE     01     PETROSSIAN      MARIA           R          10
962-06-9531      SH     01     SHERSHNEVA      DE'NIECE        N           0
960-35-2130      SI     06     SI              MARK            N           0
```

The list includes the student's name, ID, packaging status, and ISIR transaction used.

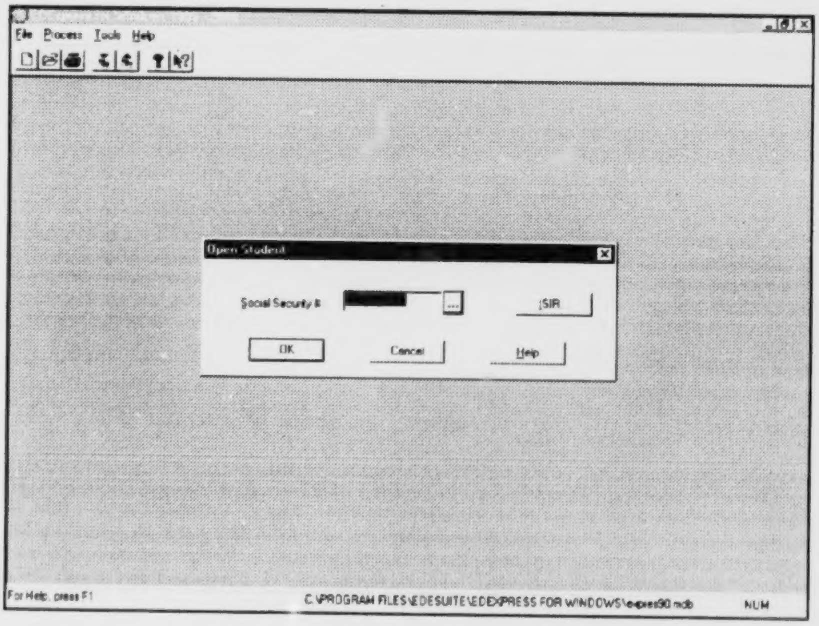
Open a Packaging Record

From the list of unpackaged students, we will use two records to review the components of the Awards tab.

To open a student record:

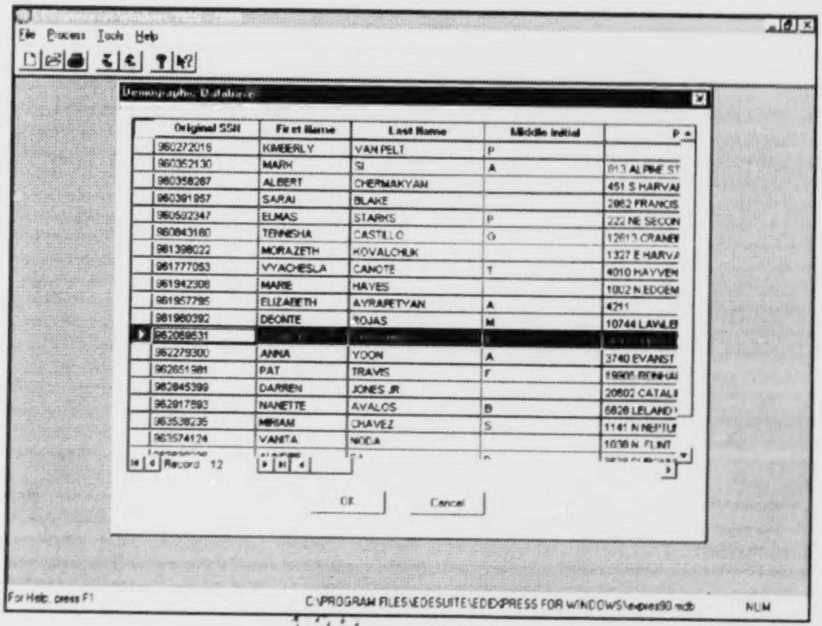
*Select **File**, **Open**.*

Type the student's SSN or click the ellipsis button.


File Process Tools Help
Open Student
Social Security #
...
ISIR
OK
Cancel
Help

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

*Highlight the desired record and click **OK**.*


File Process Tools Help
Demographic Database
Record 12
OK
Cancel

Original SSN	First Name	Last Name	Middle Initial	P
960272016	KIMBERLY	VAN PELT	P	
960352130	MARK	SI	A	813 ALPINE ST
960358287	ALBERT	CHERMAKYAN		451 S HARVA
960391957	SARAI	BLAKE		2062 FRANCIS
960592347	ELMAS	STARKS	P	222 NE SECON
960843180	TENNESHA	CASTILLO	O	12613 CRANE
961398022	MORAZETH	KOVALCHUK		1327 E HARVA
961777053	VYACHESLA	CANOTE	T	4010 HAYVEN
961942308	MARIE	HAYES		1002 N EDGEM
961957795	ELIZABETH	AYRAPETYAN	A	4211
961980392	DEONTE	ROJAS	M	10744 LAVALE
962069531	[illegible]	[illegible]	[illegible]	[illegible]
962279300	ANNA	YOON	A	3740 EVANST
962651981	PAT	TRAVIS	F	19905 RONHA
962845399	DARREN	JONES JR		20602 CATALI
962917593	NANETTE	AVALOS	B	6828 LELAND
963538235	MIRIAM	CHAVEZ	S	1141 N NEPTU
963574124	VANITA	NODA		1038 N FLINT

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

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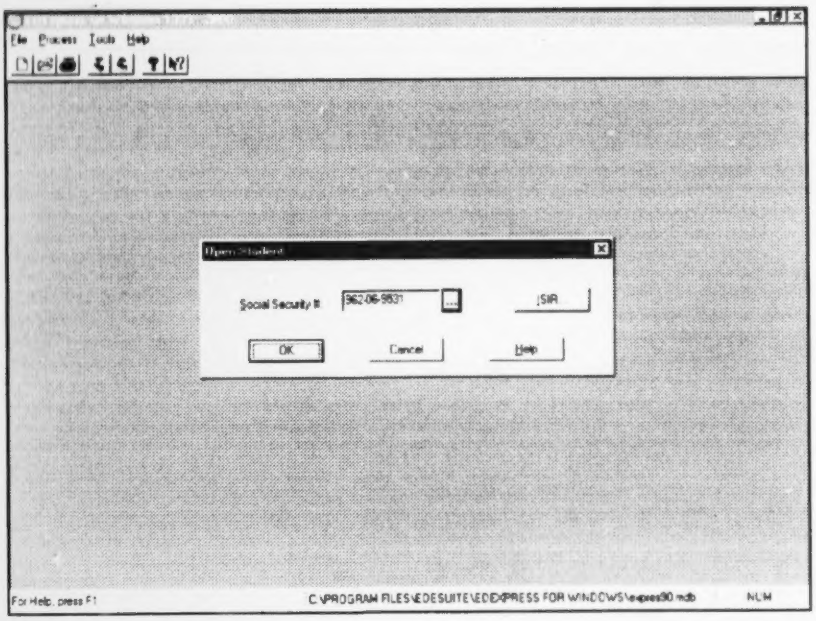
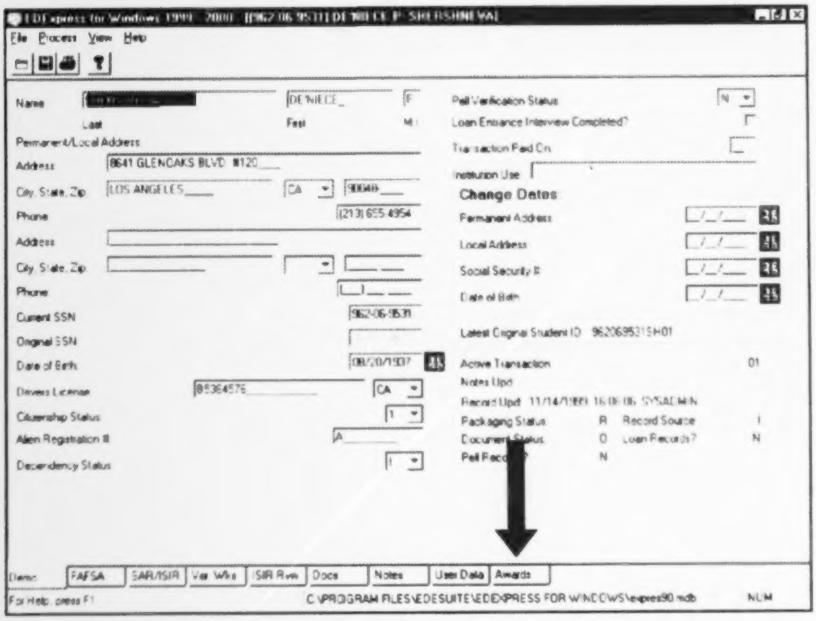

File Process Tools Help
Open Student
ISIR
OK
Cancel
Help

Social Security #: 962-06-9531

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

Click **OK** to open the record.


File Process View Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

Name: [redacted] DENIECE F
Last First MI

Permanent/Local Address

Address: 8641 GLENOAKS BLVD #120

City, State, Zip: LOS ANGELES CA 90048

Phone: (213) 655-4954

Address:

City, State, Zip:

Phone:

Current SSN: 962-06-9531

Original SSN:

Date of Birth: 08/20/1937

Drivers License: 85364576 CA

Citizenship Status: 1

Alien Registration #: A

Dependency Status: I

Pell Verification Status: N

Loan Entrance Interview Completed? ☐

Transaction Paid Cn:

Institution Use:

Change Dates:

Permanent Address: __/__/____

Local Address: __/__/____

Social Security #: __/__/____

Date of Birth: __/__/____

Latest Original Student ID: 962069531SH01

Active Transaction: 01

Notes Upd:

Record Upd: 11/14/1998 16:06:06 SYSADMIN

Packaging Status: R Record Source: I

Document Status: O Loan Records? N

Pell Records? N

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

Click the **Award** tab to view the packaging information for this student.

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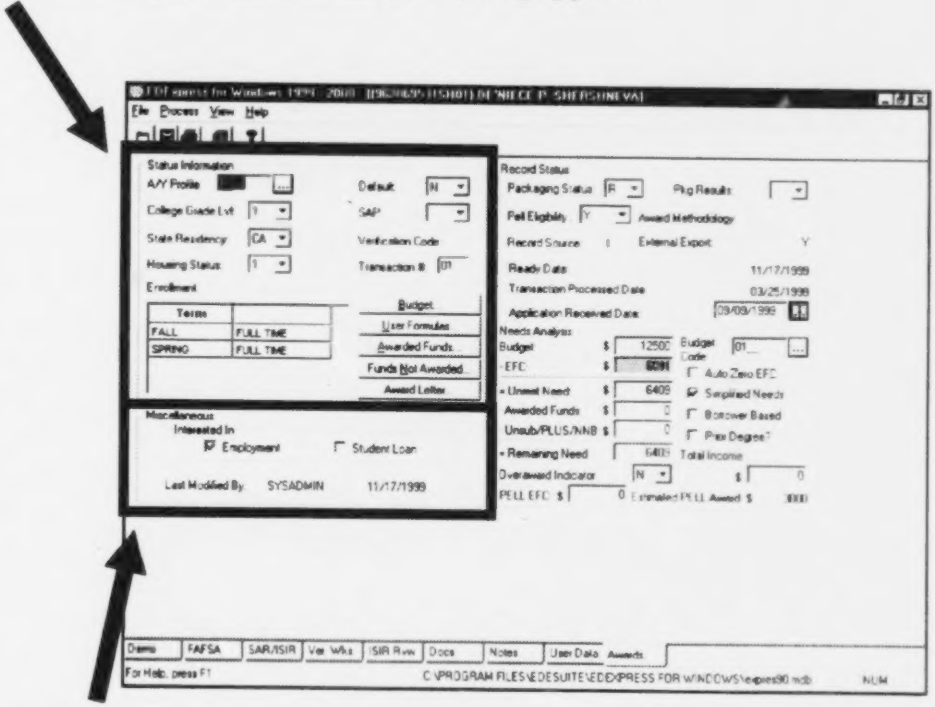
Awards Tab Review

Information on the Awards tab is grouped into four areas on the screen: Status Information, Miscellaneous, Record Status, and Needs Analysis. Each provides information that was either provided by the student from the ISIR, provided by you during the import, or calculated during the import process.

1. Status Information

In addition to the Academic Year Profile that was applied to the student, this area includes information that determines the student's eligibility for aid. Also included are the five buttons that open dialog boxes that display information used in the packaging process.



Status Information
A/Y Profile
College Grade Lvl: 1
State Residency: CA
Housing Status: 1
Default: N
SAP
Verification Code
Transaction #: 01
Enrollment

Terms	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☐ Student Loan
Last Modified By: SYSADMIN 11/17/1999

Record Status
Packaging Status: R
Pkg Results
Pell Eligibility: Y
Award Methodology
Record Source: I
External Export: Y
Ready Date: 11/17/1999
Transaction Processed Date: 03/25/1999
Application Received Date: 09/09/1999

Needs Analysis
Budget: $ 12500
- EFC: $ [illegible]
= Unmet Need: $ 6409
Awarded Funds: $ 0
Unsub/PLUS/NNB: $ 0
= Remaining Need: 6409
Overaward Indicator: N
PELL EFC: $ 0
Budget Code: 01
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Total Income: $ 0
Estimated PELL Award: $ [illegible]

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

2. Miscellaneous

This area indicates the student's preference for loans or work as reported on the FAFSA and updated on ISIR import.

3. Record Status

The two most important fields to monitor what is happening with the record are the Packaging Status and Pkg Results fields.

Packaging Status indicates the current status of the record and displays one of the following codes:

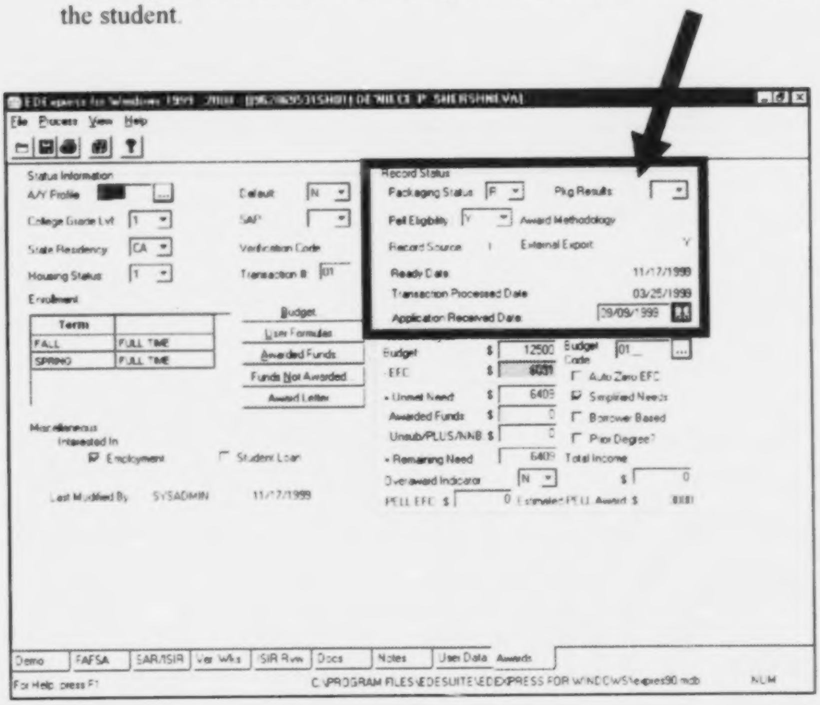
P = Packaged		**U** = Unpackaged	
R = Ready to package		**M** = Manually adjusted	
N = Not ready to package		**H** = Hand packaged	

You can manually update this field only when the Packaging status is R or U.

Pkg Results indicates whether a student has accepted (A), been offered (O), or declined (D) an award, or has been suspended (S). The **Record Source** field displays how the record was originated:

E = External import
I = ISIR originated
M = Manually originated

If packaged, the **Award Methodology** field displays the methodology code used to package the student.


EDExpress for Windows 1999 - 2000
File
Process
View
Help
Status Information
Record Status
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

A/Y Profile
College Grade Lvl: 1
State Residency: CA
Housing Status: 1
Default: N
SAP:
Verification Code
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

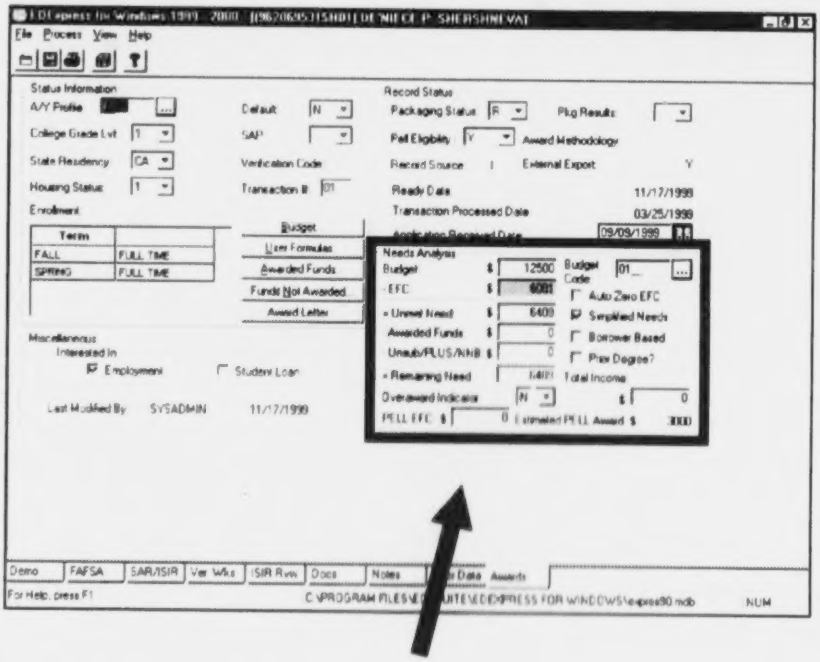
Miscellaneous
Interested In
☑ Employment ☐ Student Loan

Last Modified By SYSADMIN 11/17/1999

Packaging Status: R
Pkg Results:
Pell Eligibility: Y
Award Methodology
Record Source: I
External Export: Y
Ready Date: 11/17/1999
Transaction Processed Date: 03/25/1999
Application Received Date: 09/09/1999

Budget $ 12500
- EFC $ 6091
= Unmet Need $ 6409
Awarded Funds $ 0
Unsub/PLUS/NNB $ 0
= Remaining Need 6409
Overaward Indicator: N
PELL EFC $ 0
Estimated PELL Award $ 0000
Budget Code: 01
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Total Income $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM



EDExpress for Windows 1999 - 2000 - [96206953 1SH01 DE'NIECE P SHERSHINEVA]
File Process View Help

Status Information
A/Y Profile
College Grade Lvl: 1
State Residency: CA
Housing Status: 1
Default: N
SAP:
Verification Code
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter

Miscellaneous
Interested In
☑ Employment ☐ Student Loan

Last Modified By SYSADMIN 11/17/1999

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility: Y
Award Methodology
Record Source: I
External Export: Y
Ready Date: 11/17/1999
Transaction Processed Date: 03/25/1999
Application Received Date: 09/09/1999

Needs Analysis
Budget $ 12500
Budget Code: 01
- EFC $ 6081
☐ Auto Zero EFC
= Unmet Need $ 6400
☑ Simplified Needs
Awarded Funds $ 0
☐ Borrower Based
Unsub/PLUS/NNB $ 0
☐ Prev Degree?
= Remaining Need 6400
Total Income $ 0
Overaward Indicator: N
PELL EFC $ 0
Estimated PELL Award $ 3000

Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
r Data
Awards
For Help, press F1
C:\PROGRAM FILES\E UITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

4. Needs Analysis

All the fields in this area are used to calculate and identify the student's need.

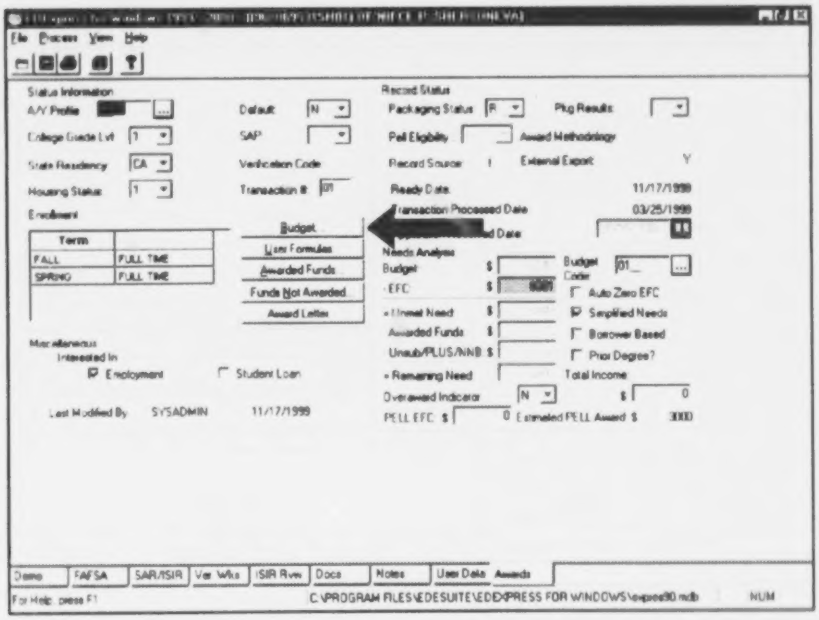
Borrower Based Flag

The Borrower Based field indicates whether this student should be awarded aid using a Borrower Based Academic Year (BBAY). In EDExpress, the use of the borrower based flag is most appropriate when you have students with mixed Scheduled Academic Years (SAY) and BBAYs. This flag can only be set manually or by using the Multiple Entry function.

How does this work during the packaging process?

1. The algorithm identifies that the record has a Borrower Based flag.
2. The loan limit amounts for subsidized and unsubsidized Stafford loans are increased to allow up to twice the amount of the annual loan limit per college grade level.
3. The amounts for each disbursement are placed in the terms defined in the Academic Year Profile. These amounts will not be allocated correctly and must be adjusted manually.

Another way to use the borrower based concept is to create an Academic Year Profile (AYP) for each enrollment period. The loan amount will then be based correctly on the college grade level indicated and will be disbursed according to the terms defined in the AYP.


File Process View Help
Budget...
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

Status Information
A/Y Profile:
College Grade Lvl: 1
State Residency: CA
Housing Status: 1
Default: N
SAP:
Verification Code
Transaction #: 01
Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology
Record Source: I
External Export: Y
Ready Date: 11/17/1999
Transaction Processed Date: 03/25/1999

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Needs Analysis
Budget $
- EFC $
Budget Code: 01_
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
= Unmet Need $
Awarded Funds $
Unsub/PLUS/NNB $
= Remaining Need
Total Income $ 0
Overaward Indicator: N
PELL EFC $ 0
Estimated PELL Award $ 3000

Miscellaneous
Interested In
☑ Employment
☐ Student Loan

Last Modified By SYSADMIN 11/17/1999

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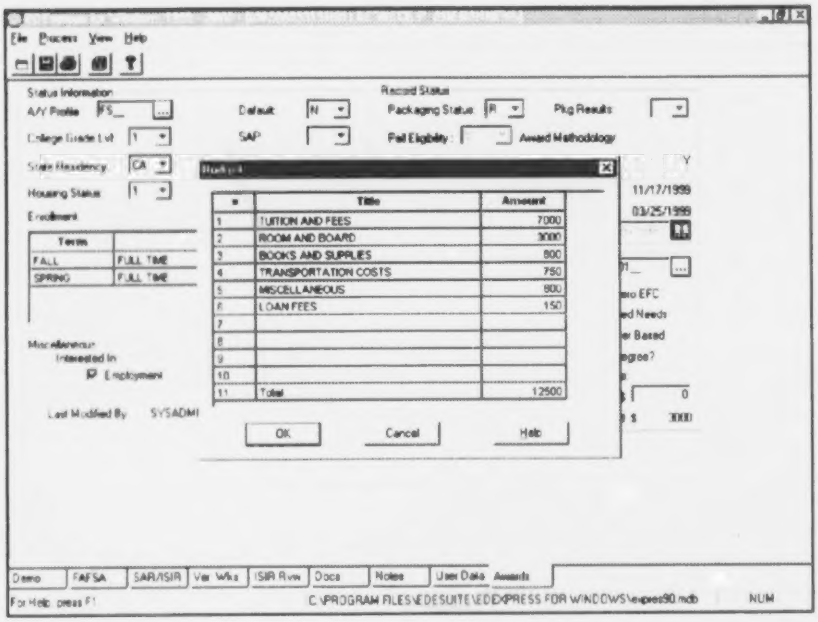
*Click the **Budget...** button to view the information about the budget that was applied to this student.*


File Process View Help
Budget
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

A/Y Profile: FS_

#	Title	Amount
1	TUITION AND FEES	7000
2	ROOM AND BOARD	3000
3	BOOKS AND SUPPLIES	800
4	TRANSPORTATION COSTS	750
5	MISCELLANEOUS	800
6	LOAN FEES	150
7		
8		
9		
10		
11	Total	12500

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb

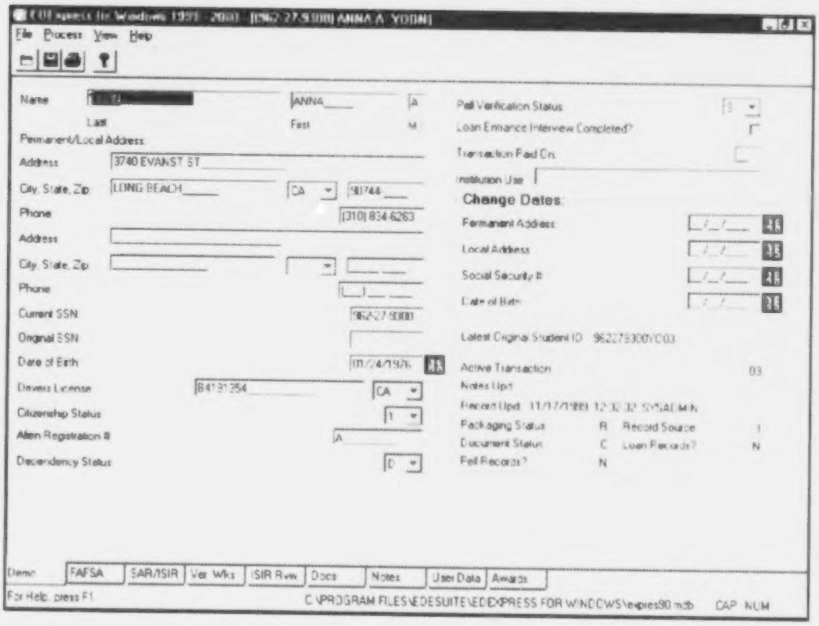
The Budget dialog box displays the components of the budget assigned to this student.

*Click **OK** to close this box.*

6 ISIR Import Into Packaging

Next, we'll take a look at a packaging record for Anna Yoon and see how much you remember. Use the same steps to open the record.

*Click the **Awards** tab to view the packaging information.*



EDExpress for Windows 1999 - 2000 - [962-27-9300] ANNA A. YOON]

Name: [redacted] (Last) ANNA (First) A (M)
Permanent/Local Address
Address: 3740 EVANST ST
City, State, Zip: LONG BEACH CA 90744
Phone: (310) 834-6263
Current SSN: 962-27-9300
Date of Birth: 01/24/1976
Drivers License: B4131254 CA
Citizenship Status: 1
Alien Registration #: A
Dependency Status: D

Pell Verification Status: S
Loan Entrance Interview Completed? ☐

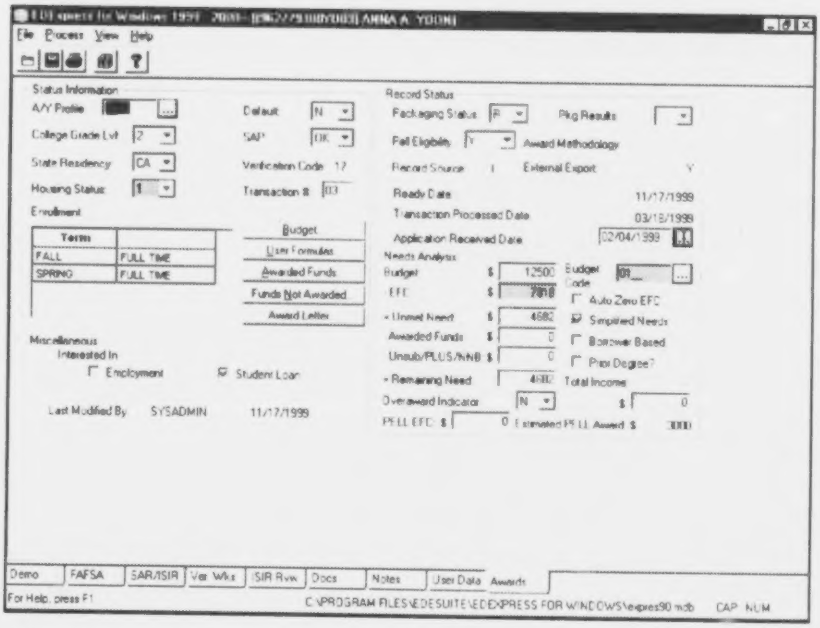
Change Dates:

Latest Original Student ID: 962279300Y003
Active Transaction: 03
Notes Upd:
Record Upd: 11/17/1999 12:32:32 SYSADMIN
Packaging Status: R Record Source: I
Document Status: C Loan Records?: N
Pell Records?: N

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb CAP NUM

File
Process
View
Help
Transaction Paid On
Institution Use
Permanent Address
Local Address
Social Security #
Date of Birth
Phone
Address
City, State, Zip
Original SSN
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

Examine this screen to fill out the Packaging Record Review Worksheet on the next page.



EDExpress for Windows 1999 - 2000 - [962279300Y003] ANNA A. YOON]

Status Information
A/Y Profile: [redacted]
College Grade Lvl: 2
State Residency: CA
Housing Status: 1
Default: N
SAP: OK
Verification Code: 17
Transaction #: 03

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In: ☐ Employment ☑ Student Loan
Last Modified By: SYSADMIN 11/17/1999

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility: Y
Award Methodology
Record Source: I
External Export: Y
Ready Date: 11/17/1999
Transaction Processed Date: 03/18/1999
Application Received Date: 02/04/1999

Needs Analysis
Budget $ 12500 Budget Code: 01
- EFC $ 7818 ☐ Auto Zero EFC
= Unmet Need $ 4682 ☑ Simplified Needs
- Awarded Funds $ 0 ☐ Borrower Based
- Unsub/PLUS/NNB $ 0 ☐ Prior Degree?
= Remaining Need 4682 Total Income $ 0
Overaward Indicator: N
PELL EFC: $ 0 Estimated PELL Award $ 3000

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb CAP NUM

File
Process
View
Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

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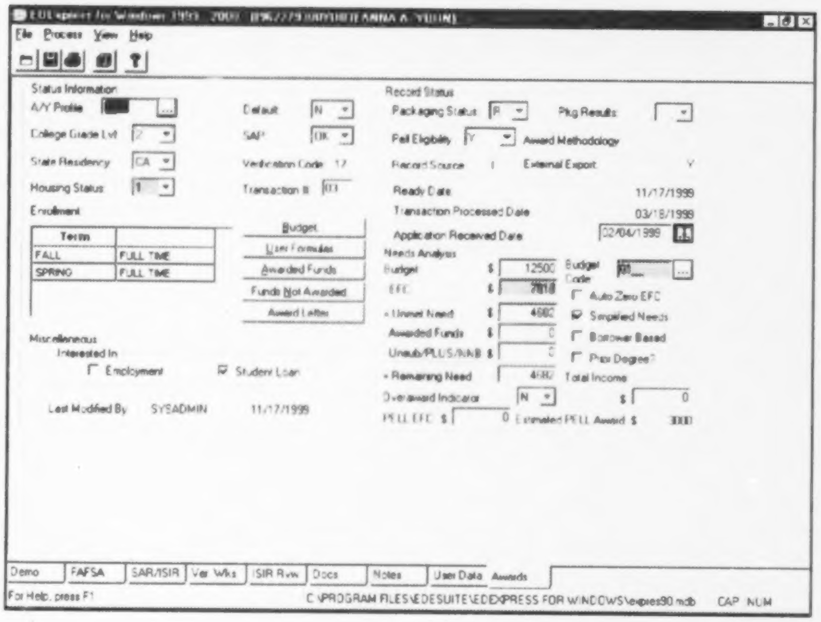
Packaging Record Review Worksheet

Has the student been packaged?	Yes ☐ No ☐
How do you know?	
Does the student have any outstanding documents that are required for packaging?	Yes ☐ No ☐
How do you know?	
How was this record created?	
Is the student ready to be packaged?	Yes ☐ No ☐
How do you know?	
Is this student likely to receive work study?	Yes ☐ No ☐

ISIR Import Into Packaging

You have learned from the student that she is in a science program that requires a special lab fee for supplies. You need to modify the budget to include the fees.

Click the ***Budget*** *button.*



File Process View Help
Status Information
Record Status
Enrollment
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Needs Analysis
Miscellaneous
Demo FAFSA SAR/ISIR Ver Wks ISIR Rvw Docs Notes User Data Awards

College Grade Lvl 2
State Residency CA
Housing Status 1
Default N
SAP OK
Verification Code 17
Packaging Status R
Pell Eligibility Y
Record Source I
External Export Y
Ready Date 11/17/1999
Transaction Processed Date 03/18/1999
Application Received Date 02/04/1999

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget $ 12500
EFC $ 7818
= Unmet Need $ 4682
Awarded Funds $ 0
Unsub/PLUS/NNB $ 0
= Remaining Need 4682
Overaward Indicator N
Total Income $ 0
PELL EFC $ 0
Estimated PELL Award $ 3000

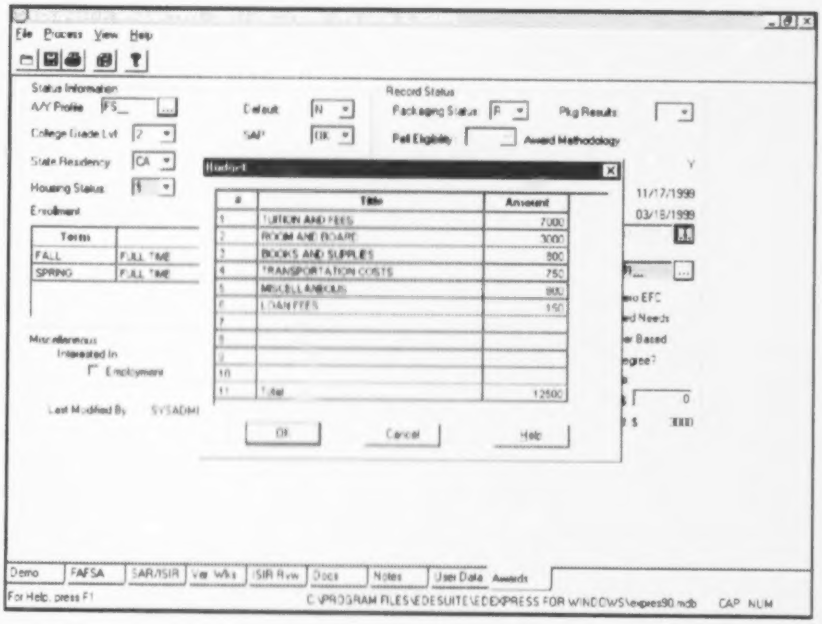
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?

Interested In
☐ Employment
☑ Student Loan

Last Modified By SYSADMIN 11/17/1999

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb CAP NUM

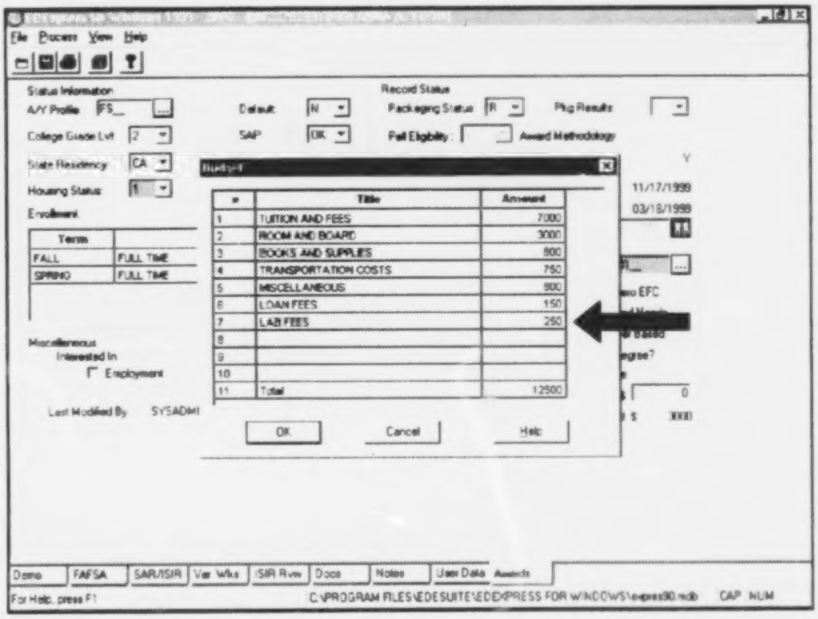
This is the student's original budget.



Budget
OK
Cancel
Help

A/Y Profile FS

#	Title	Amount
1	TUITION AND FEES	7000
2	ROOM AND BOARD	3000
3	BOOKS AND SUPPLIES	800
4	TRANSPORTATION COSTS	750
5	MISCELLANEOUS	800
6	LOAN FEES	150
7		
8		
9		
10		
11	Total	12500


File Process View Help
OK
Cancel
Help
Demo FAFSA SAR/ISIR Ver Wks ISIR Rvw Docs Notes User Data Awards

Status Information
A/Y Profile FS_
College Grade Lvl 2
State Residency CA
Housing Status 1
Default N
SAP OK
Record Status
Packaging Status R
Pkg Results
Pell Eligibility
Award Methodology

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☐ Employment
Last Modified By SYSADMI

11/17/1999
03/18/1999

Budget

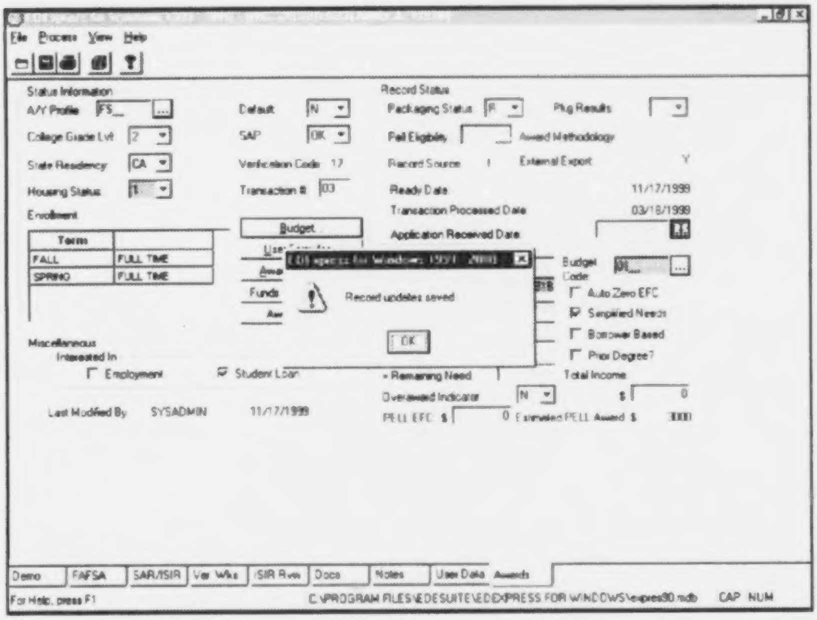
#	Title	Amount
1	TUITION AND FEES	7000
2	ROOM AND BOARD	3000
3	BOOKS AND SUPPLIES	800
4	TRANSPORTATION COSTS	750
5	MISCELLANEOUS	800
6	LOAN FEES	150
7	LAB FEES	250
8		
9		
10		
11	Total	12500

$ 0
$ 3000

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb CAP NUM

Click on the first available blank line and type a title of the budget item and the amount.

*Click **OK**.*


File Process View Help
Budget
Funds
OK
Demo FAFSA SAR/ISIR Ver Wks ISIR Rvw Docs Notes User Data Awards

Status Information
A/Y Profile FS_
College Grade Lvl 2
State Residency CA
Housing Status 1
Default N
SAP OK
Verification Code 17
Transaction # 03
Record Status
Packaging Status R
Pkg Results
Pell Eligibility
Award Methodology
Record Source I
External Export Y
Ready Date 11/17/1999
Transaction Processed Date 03/18/1999
Application Received Date

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☐ Employment
☑ Student Loan
Last Modified By SYSADMIN 11/17/1999

Budget Code 01_
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
= Remaining Need
Total Income $ 0
Overaward Indicator N
PELL EFC $ 0
Estimated PELL Award $ 3000

EDExpress for Windows 1999 - 2000

Record updates saved

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb CAP NUM

*The budget has been updated. Click **File/Save** to save the record.*

*Click **OK** to continue.*

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Apply What You Know

In the following exercises you will import ISIR data to create packaging records, print a list of unpackaged students, open a packaging record from the Awards tab, and create a simple query.

Import ISIR Records

From the main menu select **File/Import**.

Click **Packaging**.

Import Type should be **ISIR Data**.

Send the Import report to the **Screen**.

Select the **Academic Year Profile** you created in the previous exercise.

Click **Selection Criteria**.

Select the records you want to import.

Print a List of Unpackaged Records

From the main menu, select **File/Print**.

Click the **Packaging** tab.

Click the **Report** field down arrow to locate **List - Unpackaged Students**.

Send the report to the **Screen**.

Click **OK**.

Review the **Awards** tab.

Open a Packaging Record

From the menu bar select **File/Open**.

Click the **ellipsis** button to locate the record.

Click **OK**.

Click the **Awards** tab.

From the excercises, identify the following for each student:

Student ID:		
Budget Code	**Remaining Need**	**Total Budget**
Student ID:		
Budget Code	**Remaining Need**	**Total Budget**

Create a Query

Using the query worksheet on the following page, create a query to identify students who are ready to package and whose record originated from an ISIR import.

Use **Record Source** in the query statement field.

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Discussion Questions for Chapter 6

1. Is ISIR import the only way to create a packaging record?
2. How can you tell if a record has been packaged?
3. Can you modify a student's budget after the record has been packaged?
4. How can you identify records that have not been packaged?

Chapter 7

Setting Up Financial Aid Funds

Before you make the first financial aid award, you must first determine what funds you will award and how much money you have available to award from each fund. You need a fund and beginning balance for every award that will be maintained discretely. Define your sources of funding within Packaging Setup using the Fund Maintenance function. This function allows you to add and maintain as many aid sources as you need for packaging students. Fund Maintenance also provides you with online balances for total amounts awarded.

7

Setting Up Financial Aid Funds

Objectives

1. Identify funds to be included in electronic packaging.
2. Create a new fund record.
3. Identify aid types available.
4. Use the Print function to print a list of all funds including current balances.

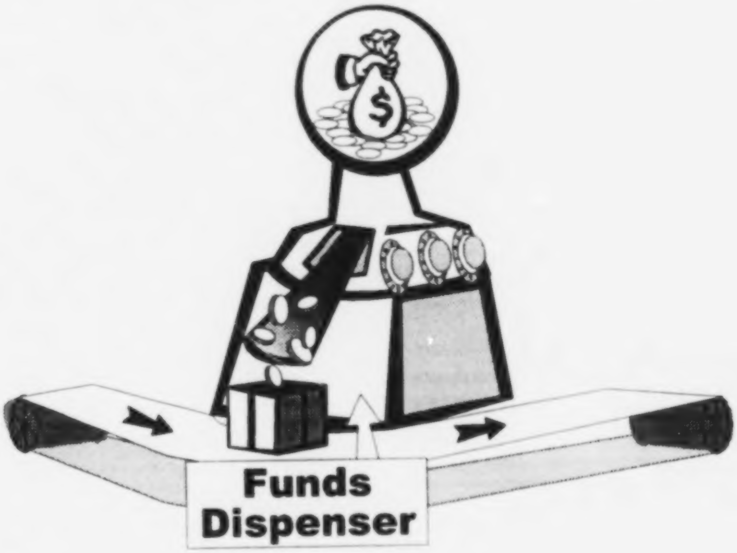
Available Funds

What is a fund?

A fund is a discrete financial aid resource. Funds are established to assist the institution with awarding and tracking award amounts. For each fund or program that you offer to students, you establish a dollar limit and the software maintains a running balance of dollars awarded.

What funds are available?

For electronic packaging and storage, you need to decide which funds you must track. EDExpress will store as many funds as you must create. In addition to the federal student aid programs, you may want to create funds for institutional programs such as scholarships, grants, and other loans.



Setting Up Financial Aid Funds

EDExpress handles funds differently based on the established aid type for the fund.

Aid Type	Description	
E	Federal Supplemental Educational Opportunity Grant (FSEOG)	You can create only one fund code using this aid type. Funds of this type are treated as gift aid.
F	Federal Pell Grant	You can create only one fund code with this aid type.
K	Perkins Loan	Funds of this type are treated as self-help aid. You can create only one fund code with this type.
P	PLUS	In the packaging process an award amount from the fund with this aid type is subject to the statutory limitations for annual amounts based on the budget and other resources. Funds of this type are treated as self-help aid. You can create only one fund code with this type.
S	Federal Subsidized Stafford Loan	In the packaging process an award amount from the fund with this aid type is subject to the statutory annual loan limit amounts based on the eligibility of the student. Funds of this type are treated as self-help aid. You can only create one fund code with this type.
U	Federal Unsubsidized Stafford Loan	In the packaging process an award amount from the fund with this aid type is subject to the statutory limitations for annual amounts based on the eligibility of the student. Funds of this type are treated as self-help aid. You can create only one fund code with this type.
G	Grant	Use for any grant or scholarship other than Pell. Federal grant funds of this type are treated as gift aid. You can create multiple fund codes using this aid type.
L	Other Need-Based Loan	In the packaging process an award amount from the fund with this aid type is limited to student's need. Funds of this type are treated as self-help aid.
N	Non-Need-Based	A fund with this aid type is not based on the student's demonstrated need. An award amount would not exceed the budget and other resources. Funds of this type are treated as self-help aid.
O	Outside Resource	Identifies a fund for which you enter an award decision made "outside" the system. These funds are considered as resources in the packaging process but cannot be automatically packaged by the software. (Add prior to packaging.)
W	Work Study	A fund with this aid type can be Federal Work Study or any other work need-based program. Funds of this type are treated as self-help aid.

Aid Type Codes E, F, K, P, S, and U may be used only once.

Setting Up Funds

The Fund Maintenance dialog box allows you to define your sources of funding. You can add and maintain as many aid sources as you need for packaging students. Fund Maintenance also provides information about the total amounts awarded and the amount remaining in the fund.

Before adding a fund to the software you must define its:

1. **Aid Type.** Some funds require a specific aid type such as F, U and S.
    - Determine if gift or self-help
    - Determine if need-based or not
2. **Beginning Balance.** How much do you have to award?
3. **Adjustments.** Do you overaward to spend all money available knowing what percentage of students do not accept awards?
4. **Allocation Limitation.** Create a query to designate a specific population to receive an award.

Tip:

If your school participates in the Direct Loan program and you will be creating loan records from packaged records, you must use the aid types S, U, and P for the loans to be created correctly.

SAMPLE

Fund Worksheet

1. Enter up to eight characters to create a free-form Fund Code.

SEOG

2. Enter up to 25 characters to create a free-form Fund Description.

Federal SEOG

3. Select an Aid Type.

G

E = FSEOG
L = Other Need-Based Loan
F = Pell
U = Unsubsidized Stafford
G = Any grant or scholarship
O = Outside
K = Perkins
P = PLUS
W = Work Study
N = Non-Need Based
S = Subsidized Stafford

4. Enter a Beginning Balance.

$275,000

Awards are automatically subtracted from the Beginning Balance.
Current (balance) plus Awarded (balance) should equal Beginning Balance if Adjustments are 0.

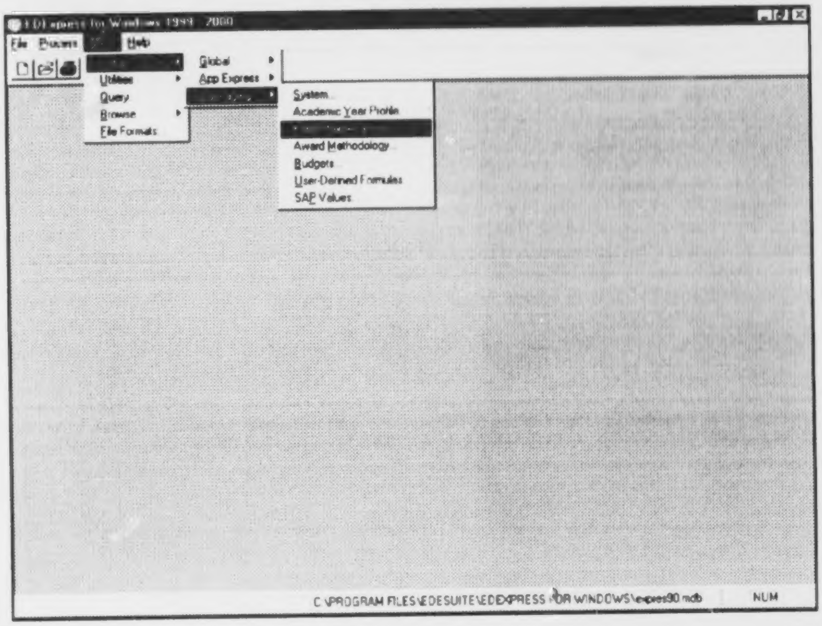
5. Adjustments increase or decrease a Beginning Balance after the initial entry of fund record.

6. Enter a Query (see Chapter 2) in the Criteria field. (optional)

Loan Criteria provides a way to limit awards for a specific fund based on characteristics. For example, Federal Work Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

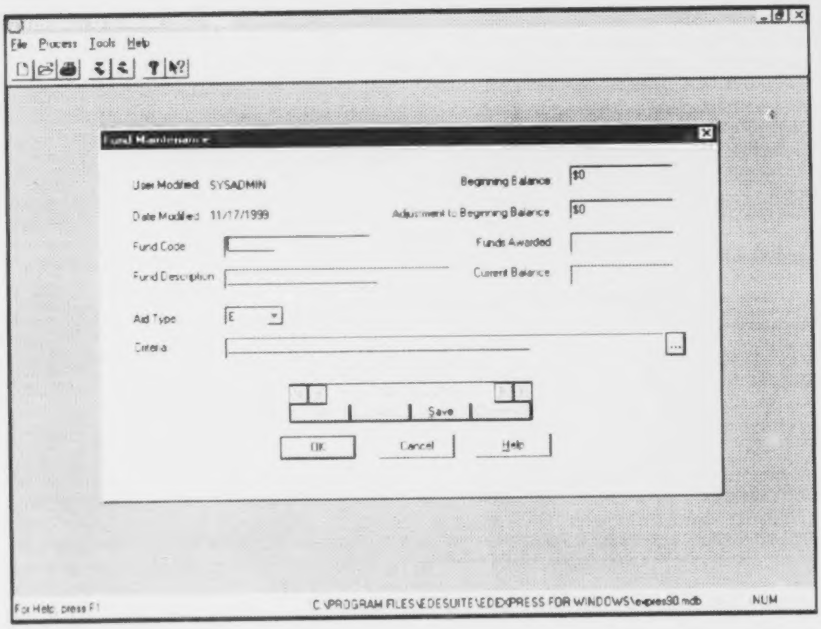
Undergraduate only

Create a Fund Record


EDExpress for Windows 1999 - 2000
File
Process
Help
Global
App Express
Utilities
Query
Browse
File Formats
System...
Academic Year Profile
Award Methodology...
Budgets...
User-Defined Formulas
SAP Values
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

To create a new fund:

*Select **Tools/Setup/Packaging/Fund Maintenance** on the menu bar.*

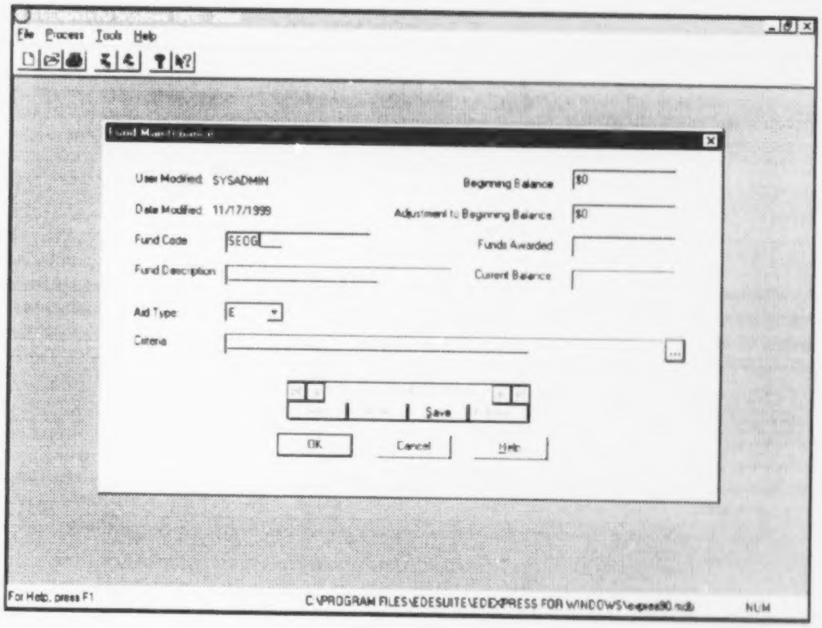

File
Process
Tools
Help
Fund Maintenance
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

User Modified SYSADMIN
Date Modified 11/17/1999
Fund Code
Fund Description
Aid Type E
Criteria
Beginning Balance $0
Adjustment to Beginning Balance $0
Funds Awarded
Current Balance

In this example, we will refer to the data on the fund worksheet. If this is the first record, begin entering information.

*If not, click **Add**.*

Type a fund code (up to 8 characters).


File Process Tools Help
Fund Maintenance
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\
NUM

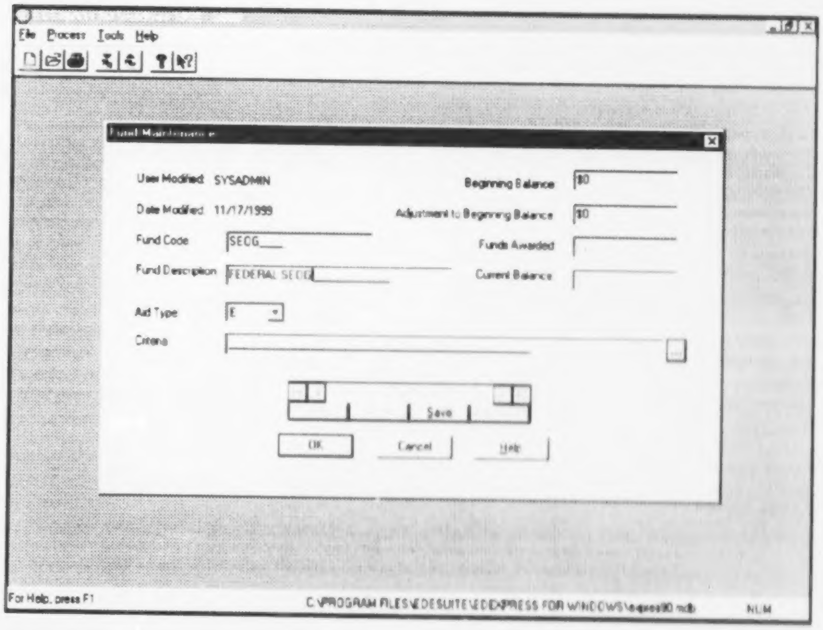
User Modified: SYSADMIN
Date Modified: 11/17/1999
Fund Code: SEOG
Fund Description:
Aid Type: E
Criteria:
Beginning Balance: $0
Adjustment to Beginning Balance: $0
Funds Awarded:
Current Balance:

Next, type a fund description (up to 25 characters). This description is used on the award letter.

Select the Aid Type from the pull-down list. The Aid Type you select determines how the fund is treated in the packaging process (Grant vs. Self-Help).

If you want to limit the population of recipients of a fund based on some criteria or attribute, enter a query in the criteria field.

Click the ellipsis button to view a list of queries.


File Process Tools Help
Fund Maintenance
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\
NUM

User Modified: SYSADMIN
Date Modified: 11/17/1999
Fund Code: SEOG
Fund Description: FEDERAL SEOG
Aid Type: E
Criteria:
Beginning Balance: $0
Adjustment to Beginning Balance: $0
Funds Awarded:
Current Balance:

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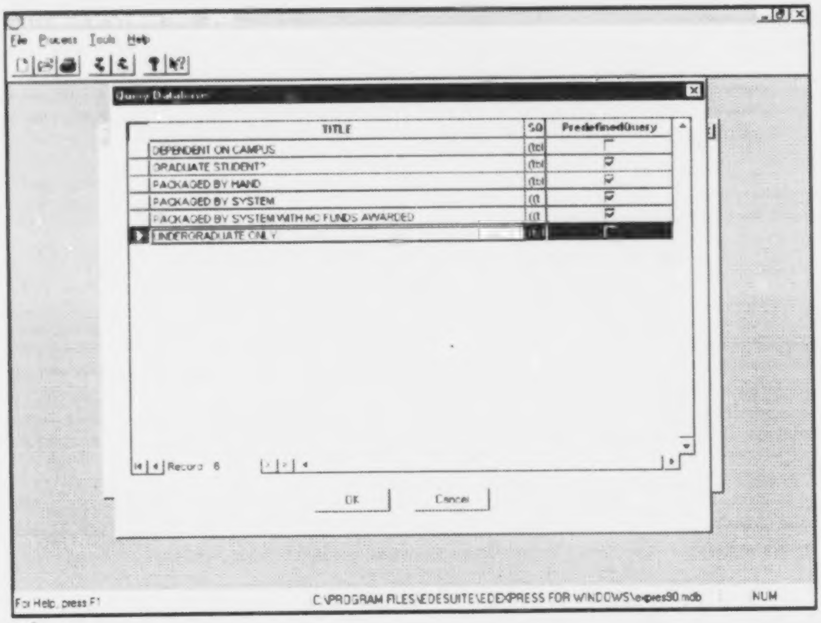
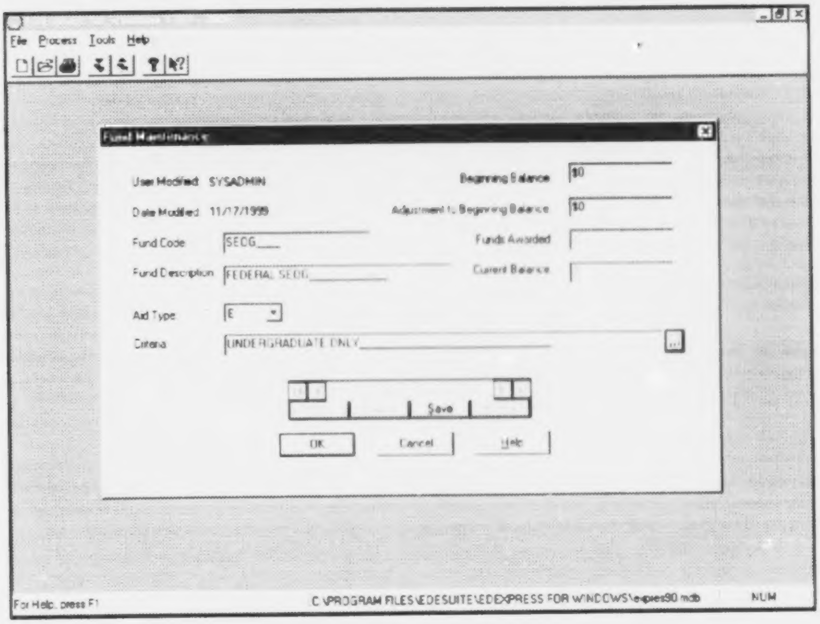

File Process Tools Help
Query Database
Record 6
OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

TITLE	SQ	PredefinedQuery
DEPENDENT ON CAMPUS	(tbl	☐
GRADUATE STUDENT?	(tbl	☑
PACKAGED BY HAND	(tbl	☑
PACKAGED BY SYSTEM	(t	☑
PACKAGED BY SYSTEM WITH NO FUNDS AWARDED	(t	☑
UNDERGRADUATE ONLY	(t	☐

Select the desired query and click **OK**.

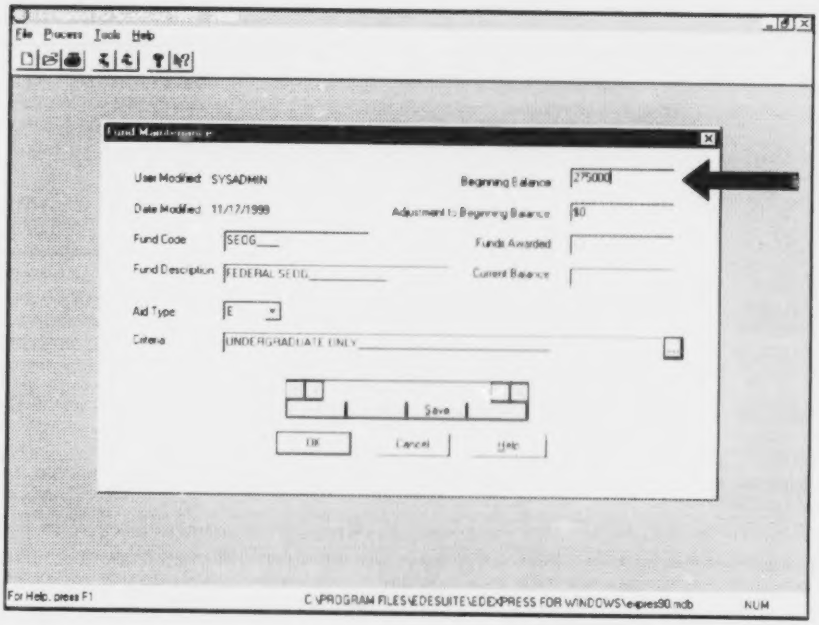

File Process Tools Help
Fund Maintenance
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

User Modified: SYSADMIN
Date Modified: 11/17/1999
Fund Code: SEOG
Fund Description: FEDERAL SEOG
Aid Type: E
Criteria: UNDERGRADUATE ONLY
Beginning Balance: $0
Adjustment to Beginning Balance: $0
Funds Awarded:
Current Balance:

The query title is displayed.

Finally, type the amount available to award in the beginning balance field.

*Click **Save** to save the new record.*



File
Process
Tools
Help
Fund Maintenance
Save
OK
Cancel
Help
For Help, press F1
NUM

User Modified SYSADMIN

Date Modified 11/17/1999

Fund Code SEOG

Fund Description FEDERAL SEOG

Aid Type E

Criteria UNDERGRADUATE ONLY

Beginning Balance 275000

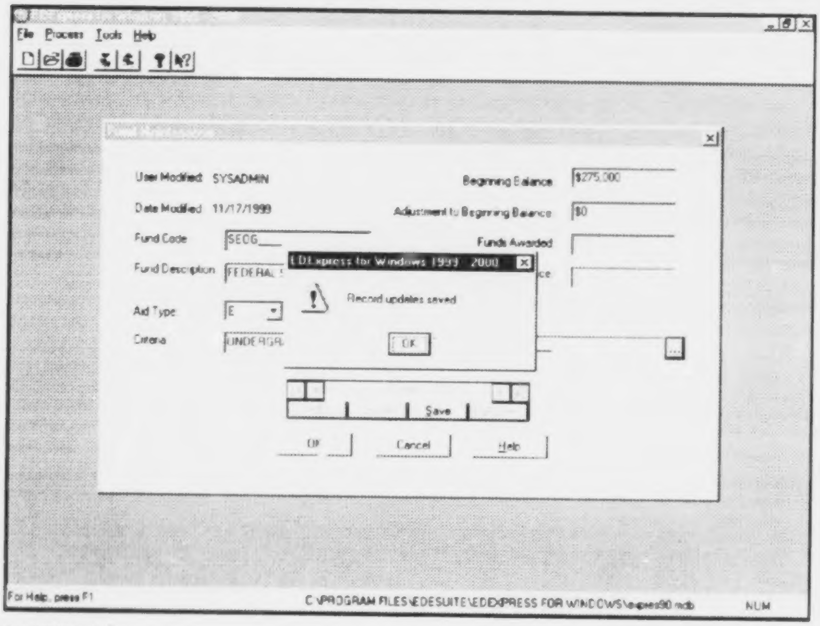
Adjustment to Beginning Balance $0

Funds Awarded

Current Balance

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Click **OK** to continue.*



File
Process
Tools
Help
OK
Save
OK
Cancel
Help
For Help, press F1
NUM

User Modified SYSADMIN

Date Modified 11/17/1999

Fund Code SEOG

Fund Description FEDERAL S

Aid Type E

Criteria UNDERGR

Beginning Balance $275,000

Adjustment to Beginning Balance $0

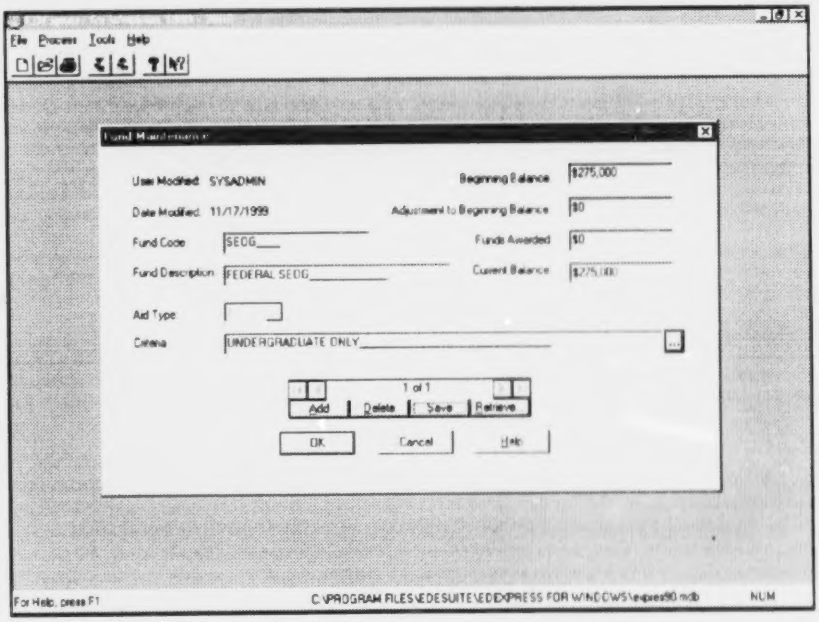
Funds Awarded

EDExpress for Windows 1999 - 2000

Record updates saved

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

BEST COPY AVAILABLE


File Process Tools Help
Fund Maintenance
1 of 1
Add
Delete
Save
Retrieve
OK
Cancel
Help

User Modified: SYSADMIN
Date Modified: 11/17/1999
Fund Code: SEOG
Fund Description: FEDERAL SEOG
Aid Type:
Criteria: UNDERGRADUATE ONLY
Beginning Balance: $275,000
Adjustment to Beginning Balance: $0
Funds Awarded: $0
Current Balance: $275,000

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

The complete record is displayed.

This process will need to be repeated for each and every fund.

Tip:

If you are entering a fund record and decide to cancel your entries and start over, click ***Cancel*** *to close the Fund Maintenance dialog box. Select* ***Fund Maintenance*** *from the Setup menu again, click* ***Add*** *and enter the new record.*

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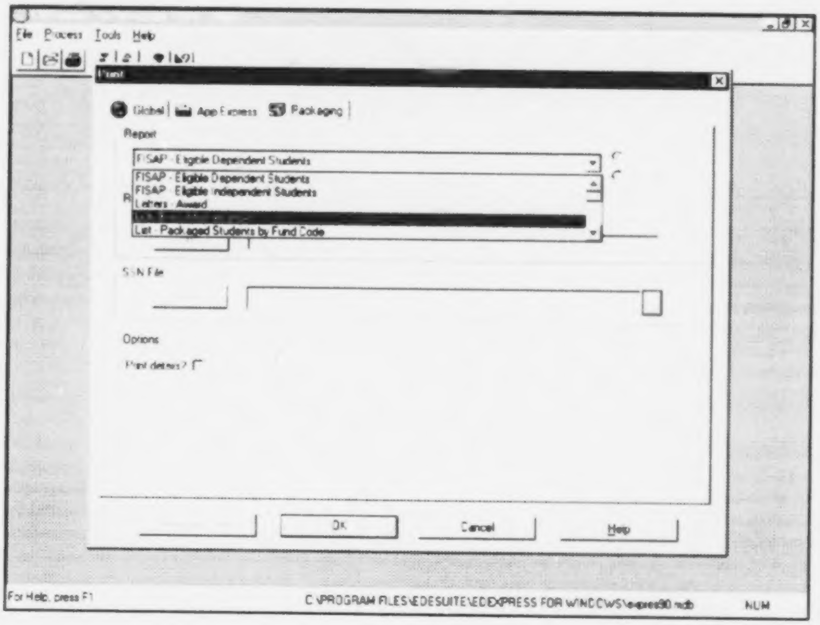
Printing a List of Funds

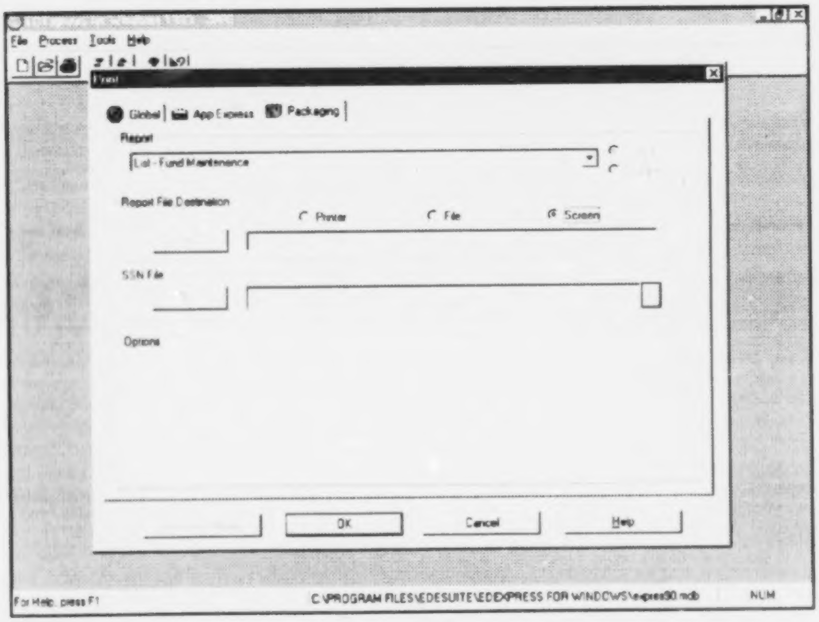
An easy way to get a snapshot of all the funds, including balances, is a printed list. This may be useful during the period you are awarding the majority of your students because it will help you to identify how much money you have remaining to spend or to make adjustments to your methodology.

*Select **File/Print** from the main menu.*

*Click the **Packaging** tab.*

*Select the report type **List-Fund Maintenance**.*


File
Process
Tools
Help
Print
Global
App Express
Packaging
Report
FISAP - Eligible Dependent Students
FISAP - Eligible Dependent Students
FISAP - Eligible Independent Students
Letters - Award
List - Packaged Students by Fund Code
SSN File
Options
Print details?
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM



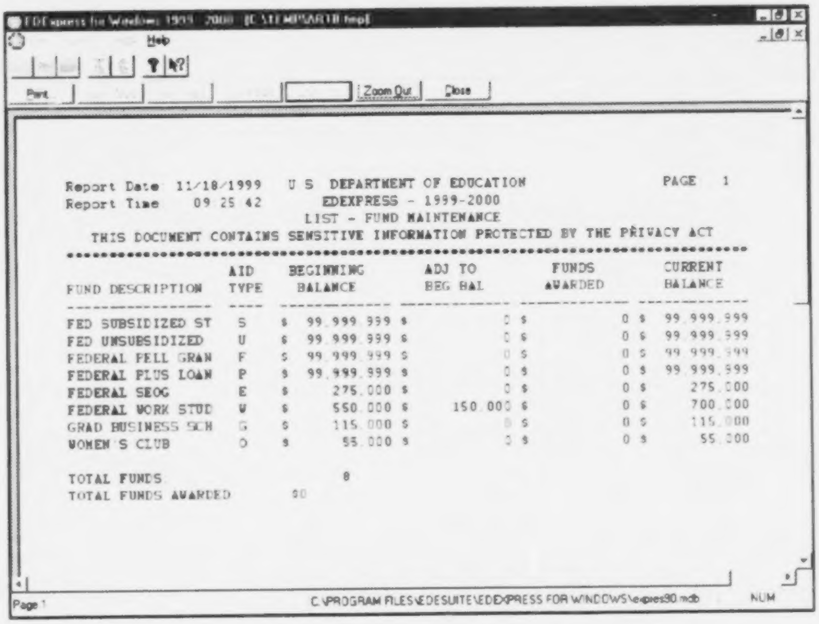
Report: List - Fund Maintenance

Report File Destination: ○ Printer ○ File ● Screen

File Process Tools Help
Print
Global
App Express
Packaging
SSN File
Options
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Click **Screen** to route the output to the screen.

Click **OK**.



```
Report Date  11/18/1999   U S  DEPARTMENT OF EDUCATION            PAGE   1
Report Time    09 25 42        EDEXPRESS - 1999-2000
                              LIST - FUND MAINTENANCE
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
**************************************************************************
                     AID   BEGINNING       ADJ TO        FUNDS        CURRENT
FUND DESCRIPTION     TYPE   BALANCE        BEG BAL       AWARDED      BALANCE
----------------     ----  -----------  ------------  ------------  -----------
FED SUBSIDIZED ST     S    $  99,999,999 $            0 $            0 $  99,999,999
FED UNSUBSIDIZED      U    $  99,999,999 $            0 $            0 $  99,999,999
FEDERAL PELL GRAN     F    $  99,999,999 $            0 $            0 $  99,999,999
FEDERAL PLUS LOAN     P    $  99,999,999 $            0 $            0 $  99,999,999
FEDERAL SEOG          E    $     275,000 $            0 $            0 $     275,000
FEDERAL WORK STUD     W    $     550,000 $      150,000 $            0 $     700,000
GRAD BUSINESS SCH     G    $     115,000 $            0 $            0 $     115,000
WOMEN'S CLUB          O    $      55,000 $            0 $            0 $      55,000

TOTAL FUNDS                        8
TOTAL FUNDS AWARDED           $0
```

EDExpress for Windows 1999 - 2000 - [C:\TEMP\SART8.tmp]
Help
Print
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

The fund maintenance list provides a summary of all funds and current balances.

Apply What You Know

What funds will you award to your students? Certainly they deserve all that they are eligible for. What's that? Do you have limited resources? You must create funds with restrictions for certain qualifying students.

In the exercises for this chapter, you will create the following funds.

Funds	Aid Type	Beginning Balance
Federal Pell Grant	F	99,999,999
Federal SEOG	E	275,000
Federal Work Study	W	400,000
Federal PLUS Loan	P	99,999,999
Women's Club	O	55,000
Subsidized Stafford Loan	S	99,999,999
Unsubsidized Stafford Loan	U	99,999,999
Grad Business Scholarship	G	115,000

Create the Records

1. Select **Tools/Setup/Packaging/Fund Maintenance** from the menu bar.
2. Click **Add** to create a new record.
3. Type a Fund Code.
4. Type a Fund Description.
5. Select the appropriate Aid Type.
6. If using a query, click the criteria ellipsis button and select the desired query.
7. Type the Beginning Balances.
8. When finished, click **Save**.
9. Continue until all funds have been added.
10. Click **OK** when complete.

Create a Query

Using the worksheet on the following page, create a query for students who express interest in and received Federal Work Study. Use **W**(Federal Work Study) in the value field.

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

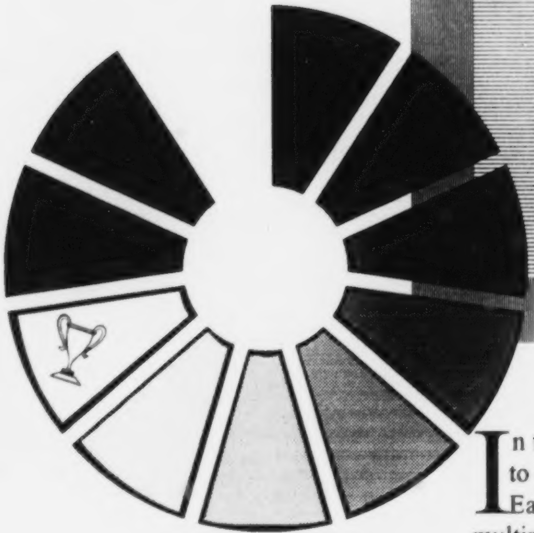
And ☐ Or ☐ Left (☐ Right) ☐

Discussion Questions for Chapter 7

1. Can you identify fund attributes?
2. Does the aid type assigned to a fund affect the packaging process? How?
3. Can only federal funds be used in packaging?
4. What two ways can you use to determine the current balance of a fund?
5. Can you adjust the balance of a fund up or down? If so, how?

Chapter 8

Award Methodologies & Packaging



In the Award Methodology profile, you can establish methodologies to determine the manner in which funds are awarded to students. Each methodology has a unique code and priority. You can create multiple methodologies to package groups of students. Each methodology is composed of:

- A User-Defined Query by which you select a group of students with specific attributes
- A Funding Package that assigns awards to students based on a priority and availability formula

These methodologies may then be applied to either a single student or a group of students.

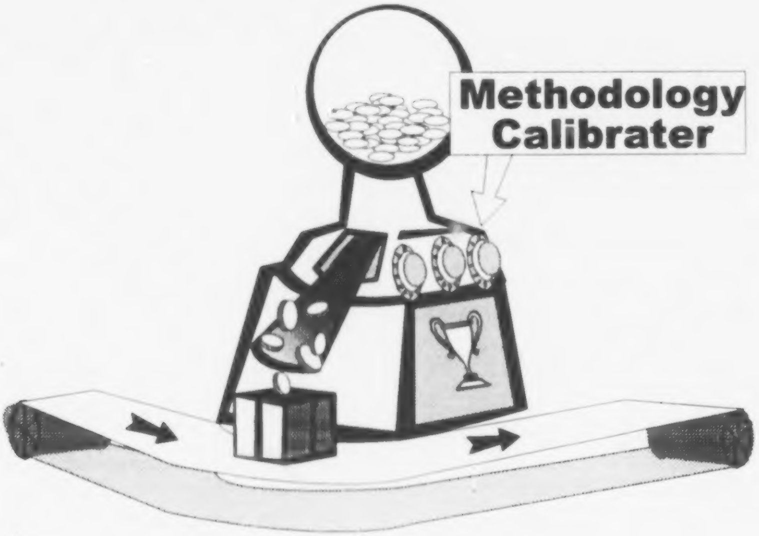
8 Award Methodologies & Packaging

Objectives

1. Identify components of an Award Methodology:
   - Queries to select groups of students by attributes present in the packaging database
   - Funding Packages that are assigned to groups of students selected by attributes
   - Priorities for which Funding Package takes precedence if more than one Funding Package applies
2. Determine if available funds cover everything or if self-help and/or gift limits must be used for more equitable packaging.
3. Establish a Funding Package formula for applying aid to selected groups of students.
4. Package a single record and a group of students.
5. Evaluate the results of the process.
6. Use the Print function to create a list of packaged records.

What is an Award Methodology?

An award methodology is a systematic method for determining which students or group of students will receive certain funds, how much money they will receive from those funds, and in what priority funds will be awarded.



Setting Award Methodologies

An award methodology dictates the funds and amounts awarded to a student. Each methodology has a unique code and priority. You can create methodologies to package selected groups of students.

For each Award Methodology you define:

- Code
- Title
- Priority
- Self-Help Aid Maximum (% or $)
- Gift Aid Maximum (% or $)
- Criteria
- Fund Code
- Fund Priority
- School Minimum
- School Maximum
- Minimum EFC
- Maximum EFC

Tips for Creating Award Methodologies

1. A student who meets the criteria for more than one methodology will be assigned the methodology with the highest code (where 0001 is highest priority and 9999 is the lowest). The query assigned to the methodologies do not run until the methodology comes in priority order.
2. After packaging has been run, review the queries used in both the award methodology and the fund and determine if the student record meets the criteria.
3. You cannot delete an award methodology if that methodology has been used to package students in your database.
4. If students do not meet the criteria set up in any of the award methodologies you have set up, the student will be packaged with no funds other than Pell if eligible, and the award methodology code on the Awards tab will appear as ####.

SAMPLE

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology.	GR
2. Enter up to 50 characters to create a free-form description of the award methodology.	
	Graduate
3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied.	2
4. Use ☒ Percentages ☐ Dollar Amounts for Aid Maximums	
5. Establish a percentage of the total award package that is awarded as self-help aid, either work-study or loans.	100
6. Establish a percentage of the total award package that is considered gift aid.	50
7. Select a Query that is used to select the group of students for this funding package.	
	Graduate
8. Establish award parameters for specific funds (Pell Grant is hard coded and therefore not entered on this table).	

Identify fund to be awarded	Identify relative priorities of award methodologies	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**
GBUS	1	$150	$2250	0	99999
WORK	2	$200	$4500	0	99999
SUBSTAFF	3	$200	99999	0	99999
UNSTAF	4	$200	99999	0	99999

SAMPLE

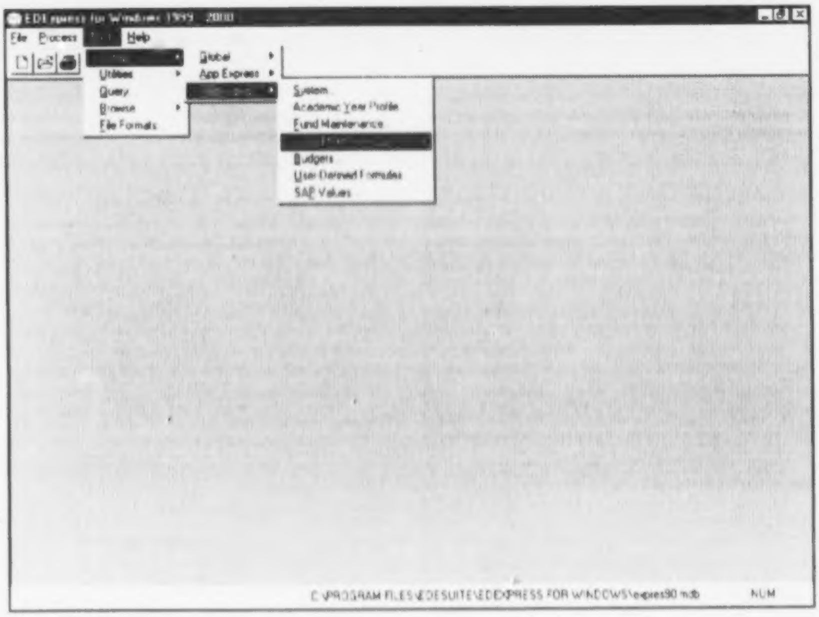
Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology.	UN
2. Enter up to 50 characters to create a free-form description of the award methodology.	
	Undergraduate
3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology will be applied.	01
4. Use ☒ Percentages ☐ Dollar Amounts for Aid Maximums	
5. Establish a percentage of the total award package that is awarded as self-help aid, either work-study or loans.	100
6. Establish a percentage of the total award package that is considered gift aid.	75
7. Select a Query that is used to select the group of students for this funding package.	
	Undergraduate

8. Establish award parameters for specific funds (Pell Grant is hard coded and therefore not entered on this table).

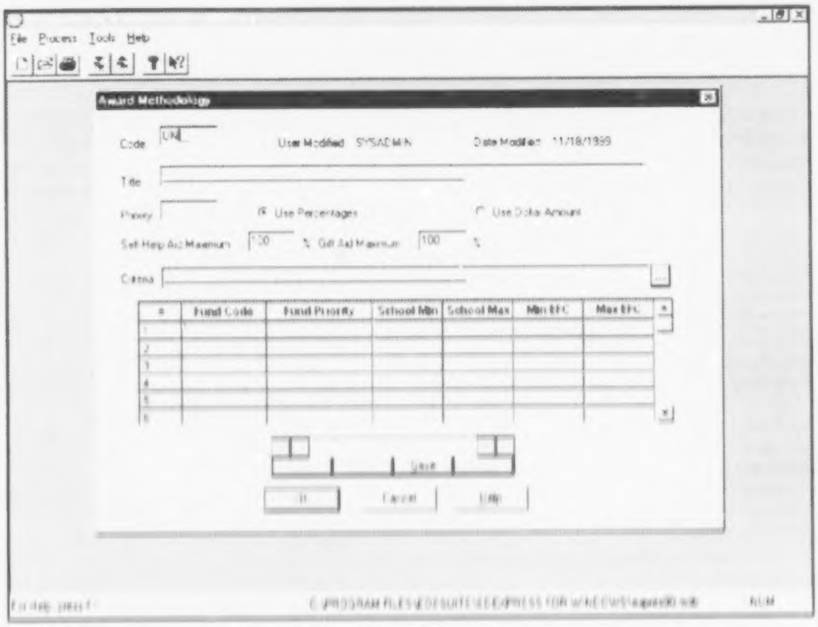
Identify fund to be awarded	Identify relative priorities of award methodologies	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**
SEOG	1	$200	$2000	0	2500
WORK	2	$200	$5000	0	99999
SUBSTAFF	3	$200	99999	0	99999
PLUS	4	$200	99999	0	99999

Creating An Award Methodology


EDExpress for Windows 1999 - 2000
File
Process
Help
Utilities
Query
Browse
File Formats
Global
App Express
System
Academic Year Profile
Fund Maintenance
Budgets
User Defined Formulas
SAP Values
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

To create a new award methodology:

*Select **Tools/Setup/Packaging/Award Methodology** from the menu bar.*


File
Process
Tools
Help
Award Methodology
Save
Cancel
Help
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code UN
User Modified SYSADMIN
Date Modified 11/18/1999
Title
Priority
● Use Percentages
○ Use Dollar Amount
Self Help Aid Maximum 100 %
Gift Aid Maximum 100 %
Criteria

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1						
2						
3						
4						
5						
6						

In this example, we will refer to the data on the Award Methodology Worksheet. Type a 2-character code to identify the record. In this example we will use UN to identify undergraduates.

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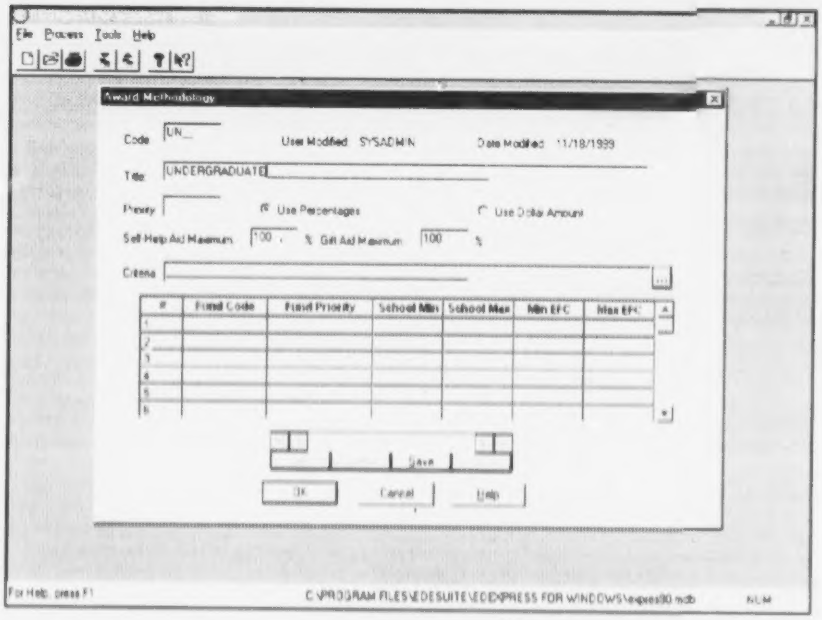
Type the free-form title of the award methodology. It should identify the students that are packaged using this methodology. For example: In-State Freshmen, Independent Upperclassmen, etc. When space is available, the title prints on reports and display screens.

The priority field indicates the order in which the methodology database is searched. The first Award Methodology User-Defined Query that matches a student's attributes is used to package that student.

Type a value between 1 and 9999.



Code: UN

User Modified: SYSADMIN

Date Modified: 11/18/1999

Title: UNDERGRADUATE

Priority:

● Use Percentages ○ Use Dollar Amount

Self Help Aid Maximum: 100 % Gift Aid Maximum: 100 %

Criteria:

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1						
2						
3						
4						
5						
6						

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If you want to limit the percentage or dollar amount of an award that a student receives from either Self-Help or Gift Aid, you can set a maximum percentage of need or dollar amount that will be awarded by funds based on the aid types of work or loans for self-help and grant for Gift Aid.

Note:

You must use either a % or a $ amount. You cannot use % for one and $ amount for another.

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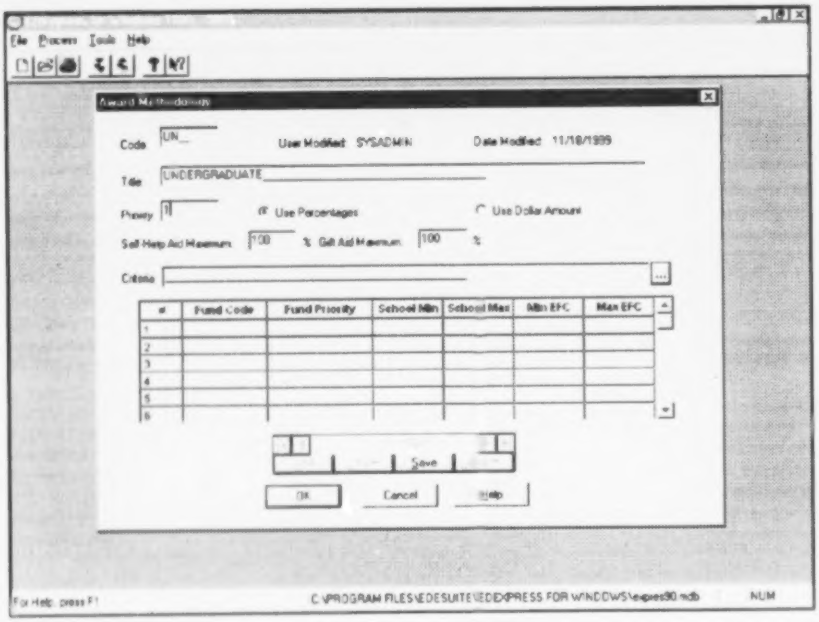

File Process Tools Help
Award Methodology
...
Save
OK
Cancel
Help
NUM

Code UN_ User Modified SYSADMIN Date Modified 11/18/1999

Title UNDERGRADUATE

Priority 1 ● Use Percentages ○ Use Dollar Amount

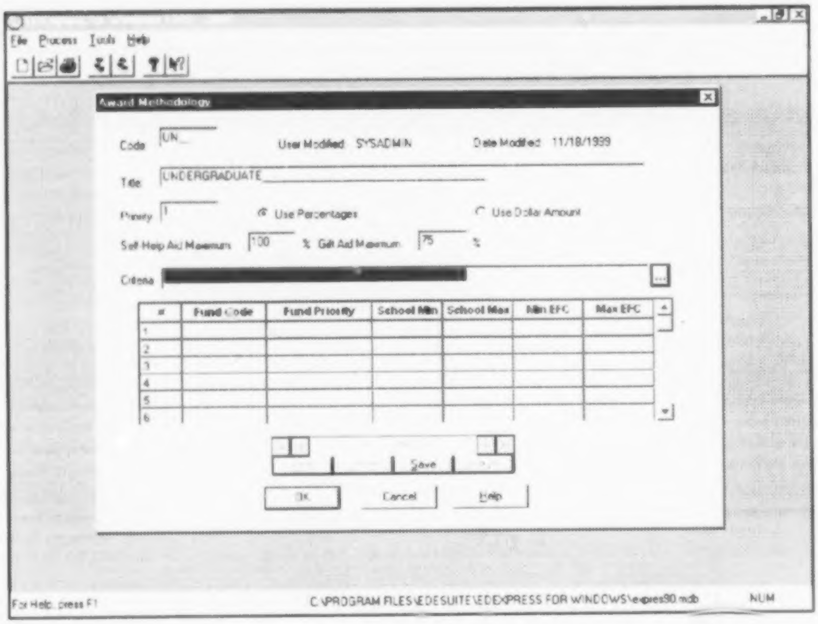
Self Help Aid Maximum 100 % Gift Aid Maximum 100 %

Criteria

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1						
2						
3						
4						
5						
6						

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Type the maximum percentage of unmet need to be met with Self Help Aid during the packaging process. Valid percentages are 000 to 100.


File Process Tools Help
Award Methodology
...
Save
OK
Cancel
Help
NUM

Code UN_ User Modified SYSADMIN Date Modified 11/18/1999

Title UNDERGRADUATE

Priority 1 ● Use Percentages ○ Use Dollar Amount

Self Help Aid Maximum 100 % Gift Aid Maximum 75 %

Criteria

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1						
2						
3						
4						
5						
6						

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

In this example we set the Self-Help Aid Maximum to 100% and Gift Aid Maximum to 75%.

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How Does It Work?

This table illustrates the allocation procedure used to calculate Gift Aid and Self-Help Aid when a maximum percent (%) is used.

	Student's Need	Gift Aid Max 50%	Self-Help Max 25%	
Max to Receive	**9000**	**50% of 9000=4500**	**25% of 9000=2250**	
Pell is not restricted by Gift Aid %	Award Range	Award Amount	Award Amount	Remaining Need
Pell	0-3125	3125		5875
Grant 1	200-2000	1375	--	4500
Work 1	200-3000	--	2250	2250
Loan 1	500-1500	--	0	2250
Grant 2	200-1000	0	--	2250

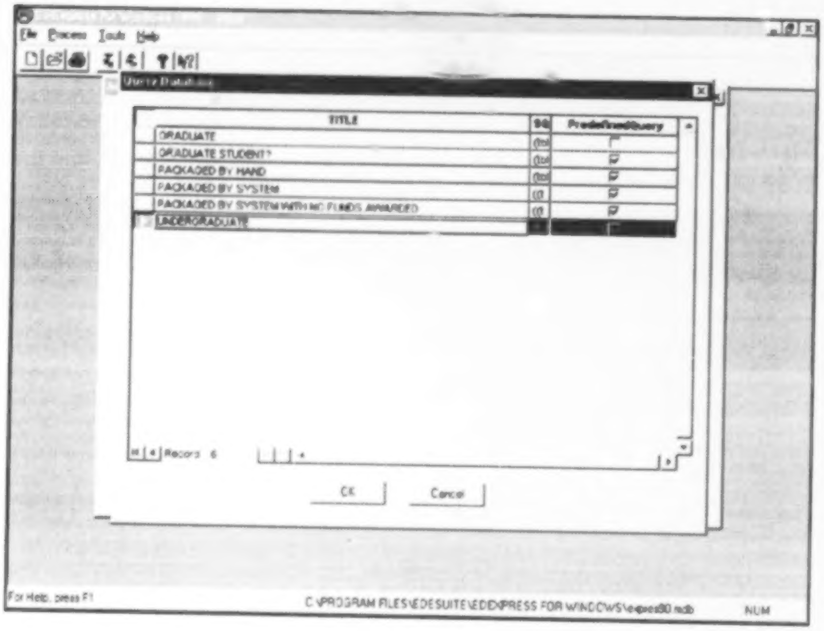
This table illustrates the basic allocation procedure used to calculate Gift Aid and Self-Help Aid when a maximum dollar amount ($) is used.

	Student's Need	Gift Aid Max	Self-Help Max	
Max to Receive	**9000**	**4500**	**4000**	
Pell is not restricted by Gift Aid %	Award Range	Award Amount	Award Amount	Remaining Need
Pell	0-3125	3125		5875
Grant 1	200-2000	1375	--	4500
Work 1	200-3000	--	3000	1500
Loan 1	500-1500	--	1000	500
Grant 2	200-1000	--	--	500

Click **Criteria** to identify the User Defined Query to select students for a funding package. Click the ellipsis button to display a list of titles created from the Query function. You may want to establish one methodology that does not use any selection criteria so every student can be packaged.

To establish a methodology without using selection criteria, skip this field.

Highlight the desired Query and click **OK**.


File Process Tools Help
Query Database
Record 6
OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres80.mdb
NUM

TITLE	SQ	PredefinedQuery
GRADUATE	[illegible]	☐
GRADUATE STUDENT?	[illegible]	☑
PACKAGED BY HAND	[illegible]	☑
PACKAGED BY SYSTEM	[illegible]	☑
PACKAGED BY SYSTEM WITH NO FUNDS AWARDED	[illegible]	☑
UNDERGRADUATE	[illegible]	☐

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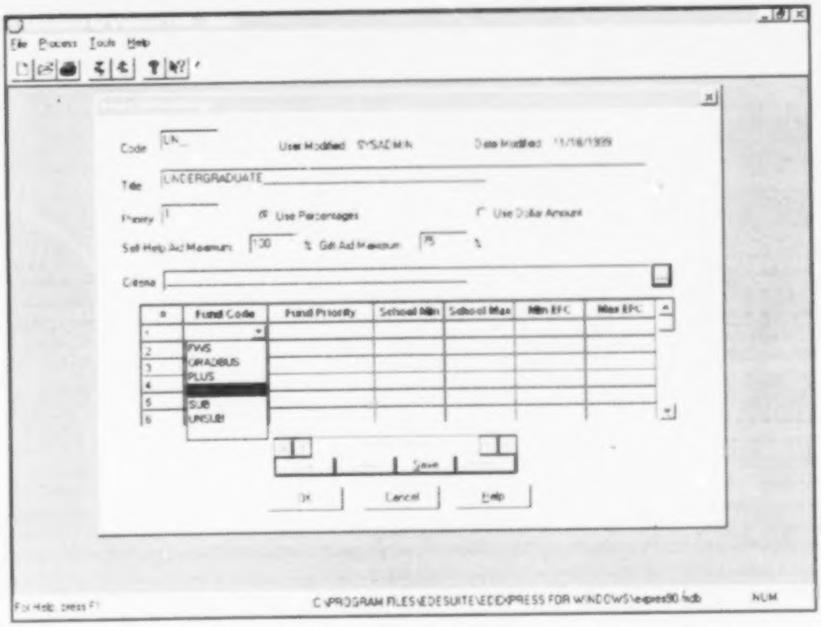
You can enter and update up to 20 fund codes for each award methodology.

Do not include the Federal Pell Grant (this option does not display in the Fund Code field) in the award methodology, because eligible recipients automatically receive the correct amount based on the academic year profile.



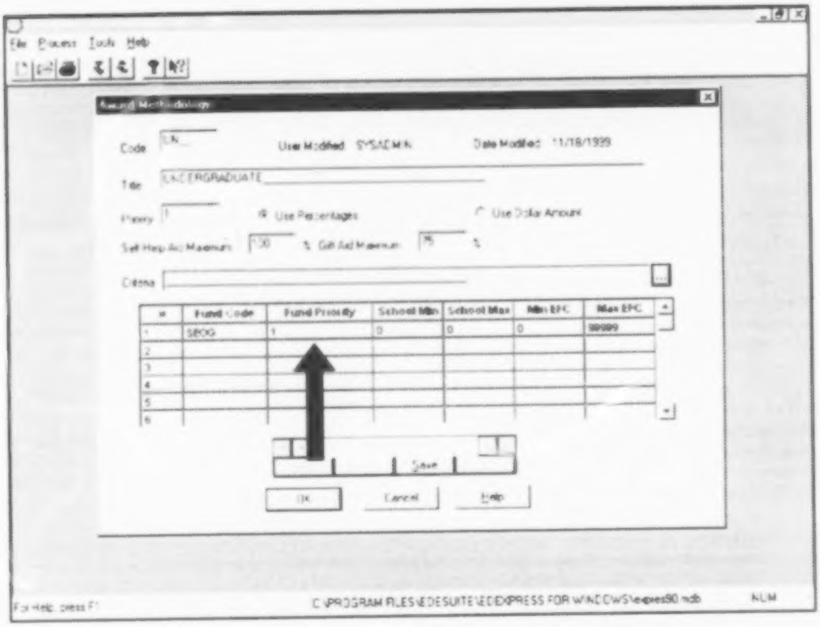
Code UN
User Modified SYSADMIN
Date Modified 11/18/1999
Title UNDERGRADUATE
Priority 1
● Use Percentages ○ Use Dollar Amount
Self Help Aid Maximum 100 % Gift Aid Maximum 75 %
Criteria

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1						
2						
3						
4						
5						
6						

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

*Click the **down arrow** to display a list of valid fund codes and click the fund code you want to use. The code you enter must be predefined in the fund database.*

You can include a fund in a methodology more than once if you wish to define a range of eligibility for students.



Code UN
User Modified SYSADMIN
Date Modified 11/18/1999
Title UNDERGRADUATE
Priority 1
● Use Percentages ○ Use Dollar Amount
Self Help Aid Maximum 100 % Gift Aid Maximum 75 %
Criteria

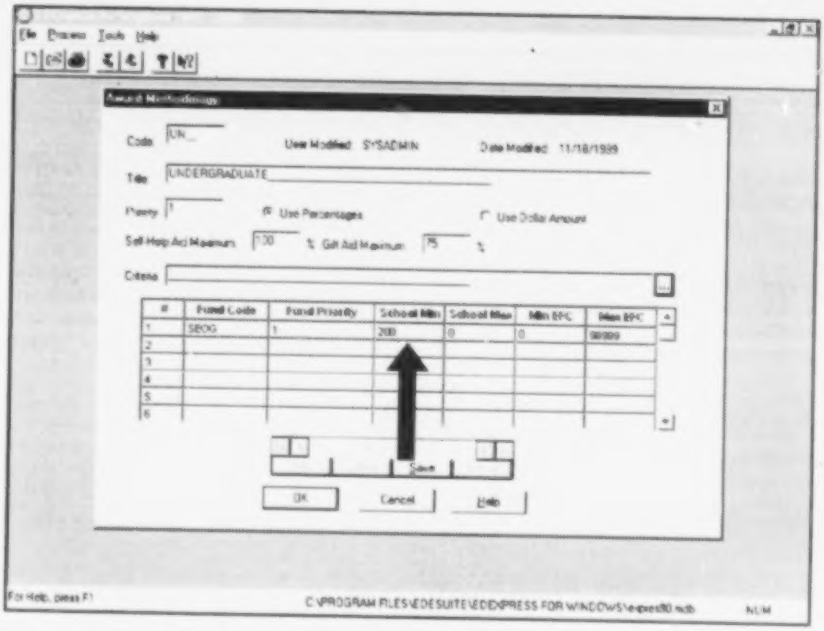
#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1	SEOG	1	0	0	0	99999
2						
3						
4						
5						
6						

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

The fund priority is the order in which funds are awarded within this award methodology. Type the priority in the text entry box.

School Min identifies the minimum amount awarded for this fund per student within this award methodology.

Type theamount in the text entry box. Valid amounts are 0 to 99999


File Process Tools Help
Award Methodology
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code: UN_
User Modified: SYSADMIN
Date Modified: 11/18/1999
Title: UNDERGRADUATE
Priority: 1
● Use Percentages ○ Use Dollar Amount
Self Help Aid Maximum: 100 % Gift Aid Maximum: 75 %
Criteria:

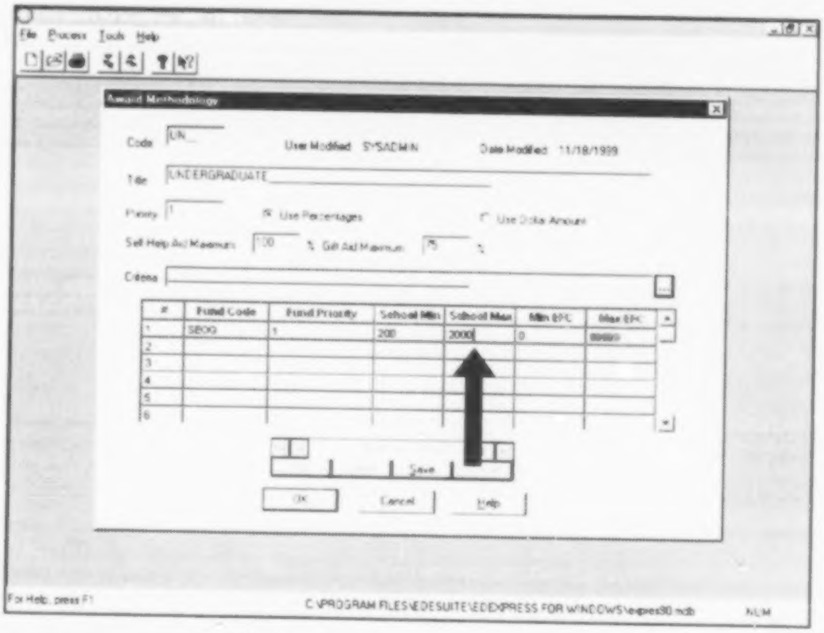
#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1	SEOG	1	200	0	0	99999
2						
3						
4						
5						
6						

Note:

If a student has remaining need but your school has set a minimum above that need, the student will not be awarded despite his/her need.

School Max identifies the maximum amount awarded for this fund per student within this award methodology.

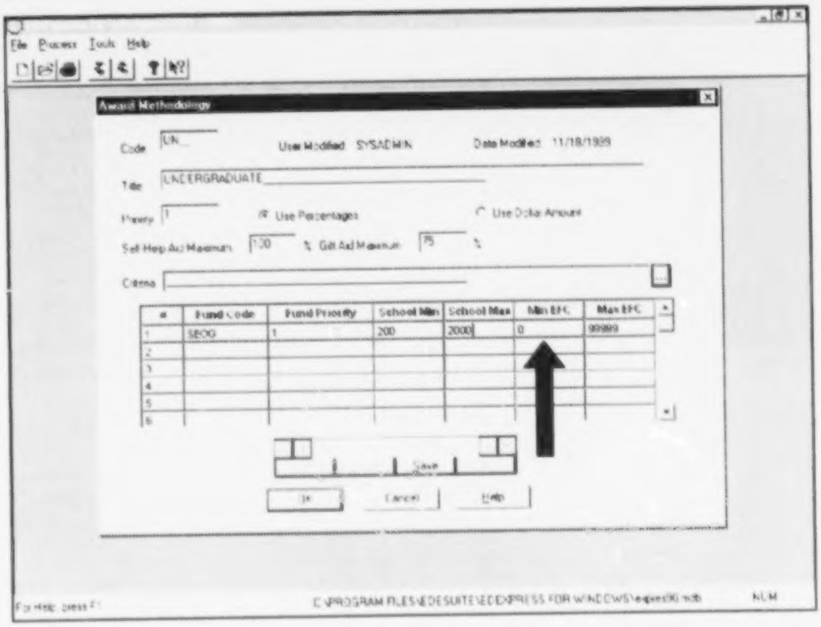
Type theamount in the text entry box. Valid amounts are 0 to 99999


File Process Tools Help
Award Methodology
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Code: UN_
User Modified: SYSADMIN
Date Modified: 11/18/1999
Title: UNDERGRADUATE
Priority: 1
● Use Percentages ○ Use Dollar Amount
Self Help Aid Maximum: 100 % Gift Aid Maximum: 75 %
Criteria:

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1	SEOG	1	200	2000	0	99999
2						
3						
4						
5						
6						

BEST COPY AVAILABLE


File Process Tools Help
Award Methodology
Save
OK
Cancel
Help
For Help, press F1
NUM

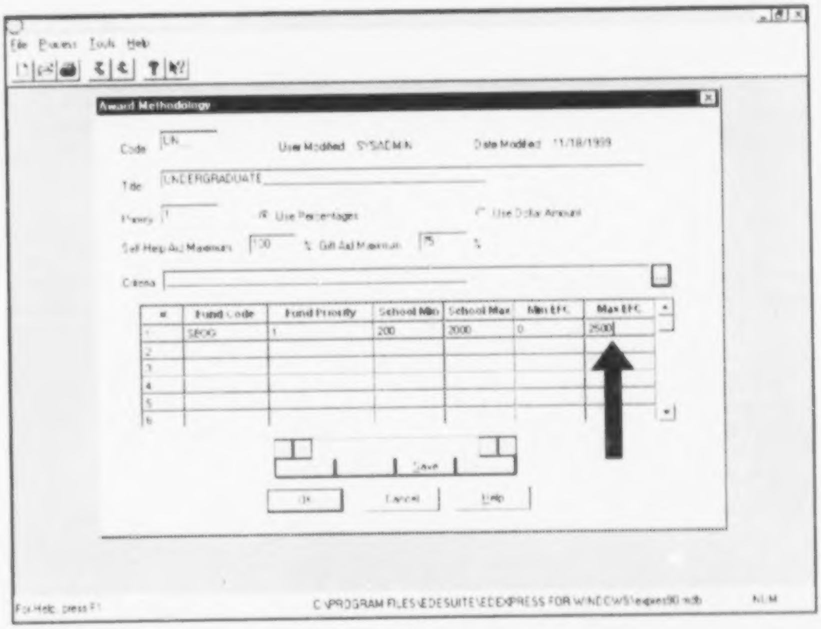
Code: UN
User Modified: SYSADMIN
Date Modified: 11/18/1999
Title: UNDERGRADUATE
Priority: 1
● Use Percentages ○ Use Dollar Amount
Self Help Aid Maximum: 100 %
Gift Aid Maximum: 75 %
Criteria:

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1	SEOG	1	200	2000	0	99999
2						
3						
4						
5						
6						

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Set the minimum EFC you want to allow for this fund to be packaged using this award methodology.

We'll leave this field at the default value of 0. Note that the Max EFC for SEOG is 99999.


File Process Tools Help
Award Methodology
Save
OK
Cancel
Help
For Help, press F1
NUM

Code: UN
User Modified: SYSADMIN
Date Modified: 11/18/1999
Title: UNDERGRADUATE
Priority: 1
● Use Percentages ○ Use Dollar Amount
Self Help Aid Maximum: 100 %
Gift Aid Maximum: 75 %
Criteria:

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1	SEOG	1	200	2000	0	2500
2						
3						
4						
5						
6						

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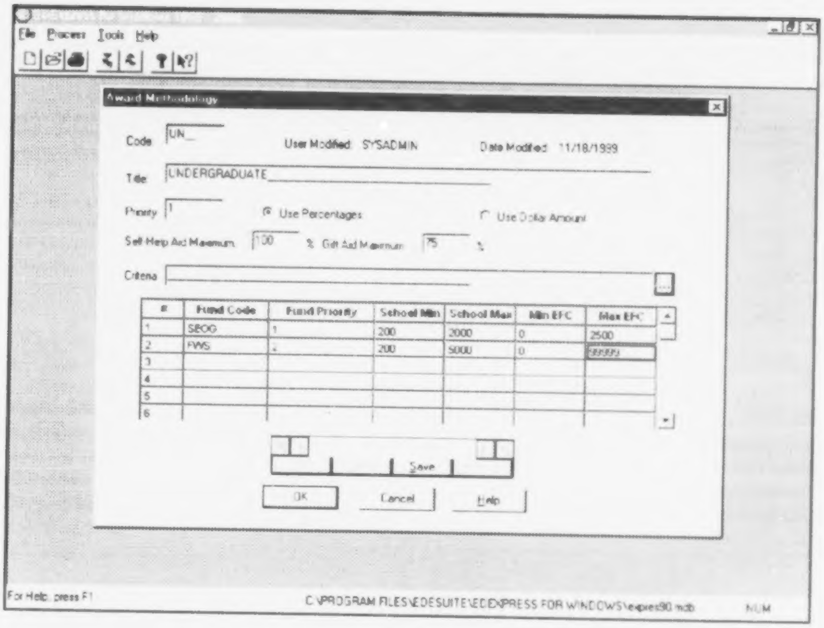
Set the maximum EFC you want to allow for this fund to be packaged using this award methodology.

Continue adding funds (up to 20) until completed


File Process Tools Help
Award Methodology
☐ Use Dollar Amount
Save
OK
Cancel
Help
For Help, press F1
NUM

Code: UN

User Modified: SYSADMIN

Date Modified: 11/18/1999

Title: UNDERGRADUATE

Priority: 1

● Use Percentages

Self Help Aid Maximum: 100 %

Gift Aid Maximum: 75 %

Criteria:

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1	SEOG	1	200	2000	0	2500
2	FWS	2	200	5000	0	99999
3						
4						
5						
6						

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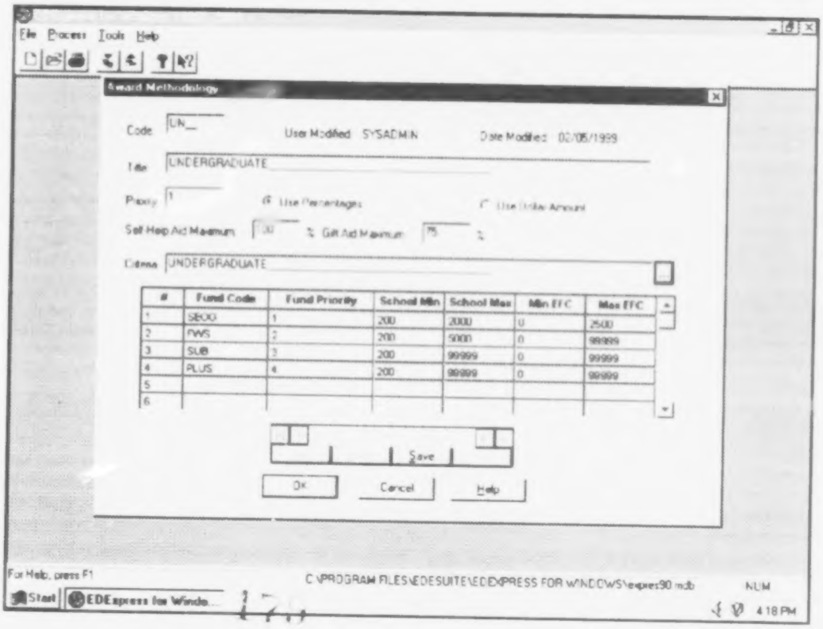
Remember:

You can only use a fund that has been previously established in Fund Maintenance Setup.

Click the ***Save*** *button to save the record*


File Process Tools Help
Award Methodology
☐ Use Dollar Amount
Save
OK
Cancel
Help
For Help, press F1
NUM
Start
EDExpress for Windo...
4:18 PM

Code: UN

User Modified: SYSADMIN

Date Modified: 02/05/1999

Title: UNDERGRADUATE

Priority: 1

● Use Percentages

Self Help Aid Maximum: 100 %

Gift Aid Maximum: 75 %

Criteria: UNDERGRADUATE

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1	SEOG	1	200	2000	0	2500
2	FWS	2	200	5000	0	99999
3	SUB	3	200	99999	0	99999
4	PLUS	4	200	99999	0	99999
5						
6						

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

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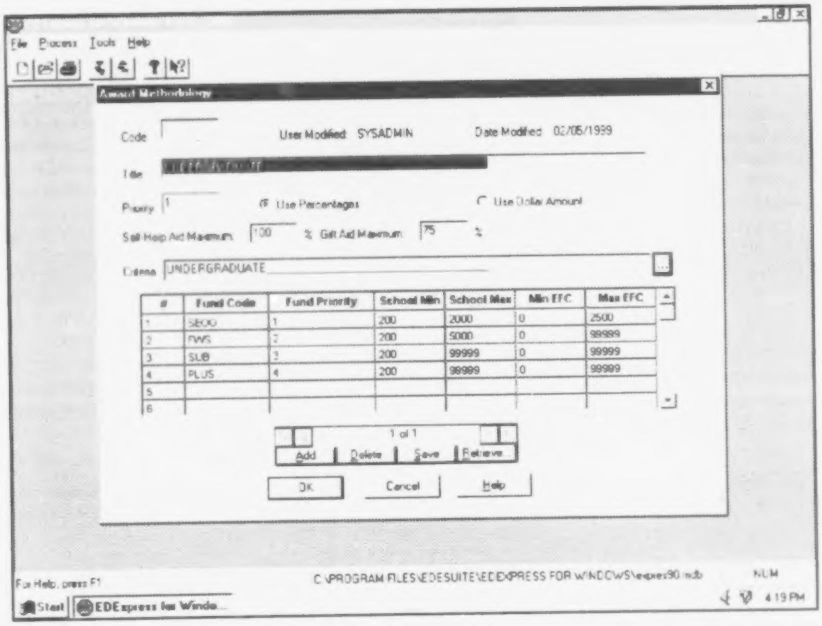

This is a completed Award Methodology

File Process Tools Help
Award Methodology

Code

User Modified SYSADMIN

Date Modified 02/05/1999

Title [illegible]

Priority 1

● Use Percentages ○ Use Dollar Amount

Self Help Aid Maximum 100 % Gift Aid Maximum 75 %

Criteria UNDERGRADUATE

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC
1	SEOG	1	200	2000	0	2500
2	FWS	2	200	5000	0	99999
3	SUB	3	200	99999	0	99999
4	PLUS	4	200	99999	0	99999
5						
6						

1 of 1
Add
Delete
Save
Retrieve
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM
Start
EDExpress for Windo...
4:19 PM

Tip:

The software is coded to correctly award the maximum statutory limits for the aid types defined for Federal Subsidized and Unsubsidized Stafford and PLUS loans. In the award methodology, set the software to award up to the program limit by setting the value to 99999.

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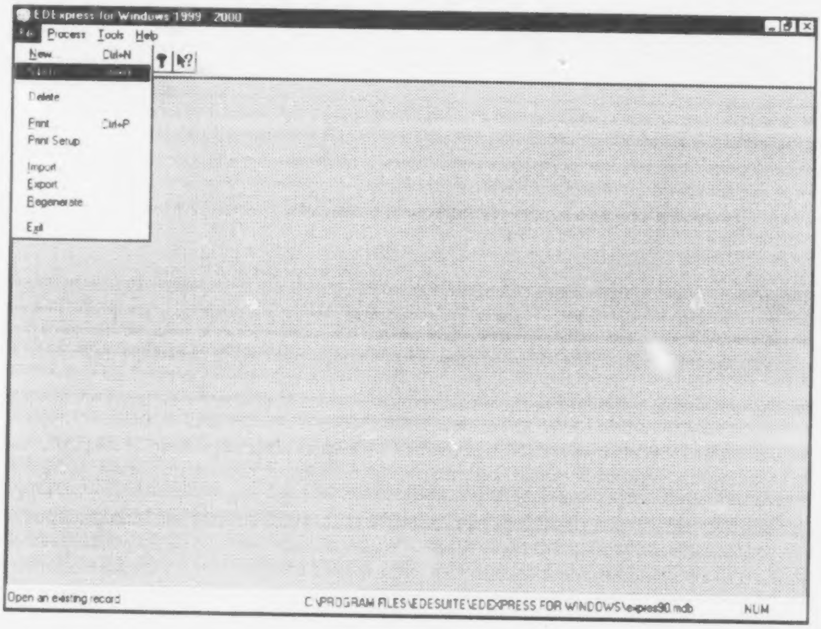
Packaging an Individual Student

In this section you learn to:

- Open a record
- Manually add an outside resource to the awarded funds
- Run the Package process
- Review the results
- Manually add a document to the Docs tab

*Select **File**, **Open** from the main menu.*


EDExpress for Windows 1999 2000
Process
Tools
Help
New Ctrl+N
Delete
Print Ctrl+P
Print Setup
Import
Export
Regenerate
Exit
NUM

Open an existing record

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

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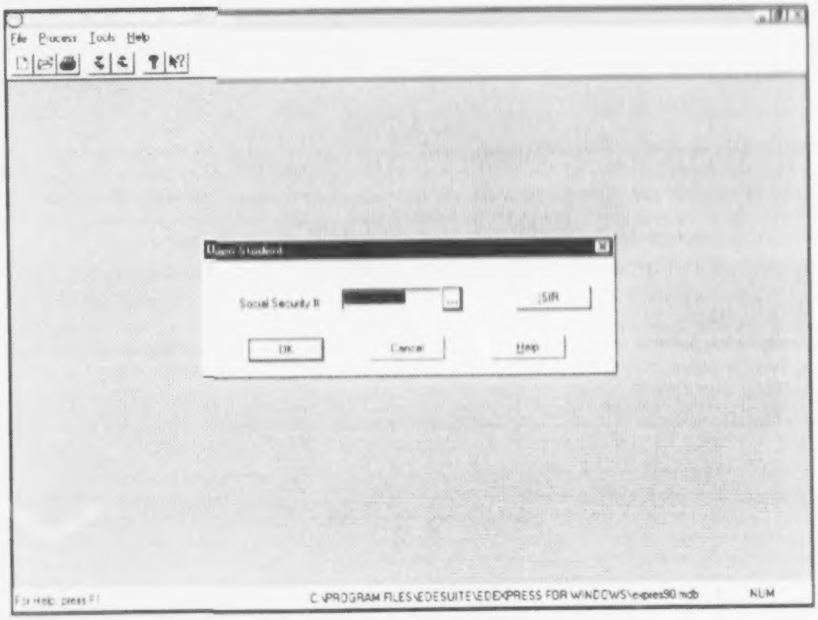
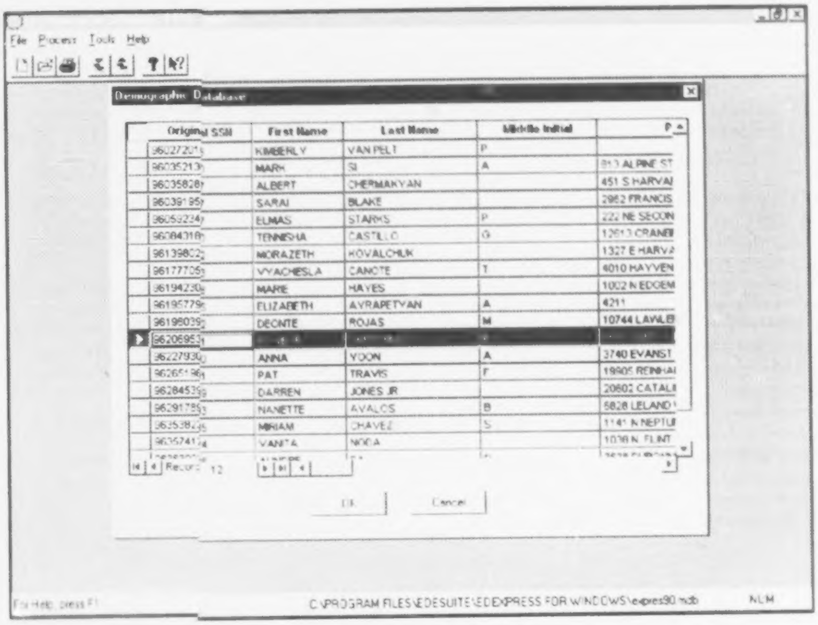

File Process Tools Help
Open Student
Social Security #
...
ISIR
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

*Click the **ellipsis** button to view the pick list of records*


File Process Tools Help
Demographic Database
Record: 12
OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Original SSN	First Name	Last Name	Middle Initial	P
96027201	KIMBERLY	VAN PELT	P	
96035213	MARH	SI	A	813 ALPINE ST
96035828	ALBERT	CHERMAKYAN		451 S HARVAI
96039195	SARAI	BLAKE		2962 FRANCIS
96059234	ELMAS	STARKS	P	222 NE SECON
96084318	TENNISHA	CASTILLO	G	12613 CRANE
96139802	MORAZETH	KOVALCHUK		1327 E HARVA
96177705	VYACHESLA	CANOTE	T	4010 HAYVEN
96194230	MARIE	HAYES		1002 N EDGEM
96195779	ELIZABETH	AVRAPETYAN	A	4211
96198039	DEONTE	ROJAS	M	10744 LAWLE
96206953	[illegible]	[illegible]	[illegible]	[illegible]
96227930	ANNA	YOON	A	3740 EVANST
96265186	PAT	TRAVIS	F	19905 REINHA
96284539	DARREN	JONES JR		20802 CATALI
96291789	NANETTE	AVALOS	B	5828 LELAND
96353823	MIRIAM	CHAVEZ	S	1141 N NEPTU
96357412	VANITA	NOGA		1038 N. FLINT

*Highlight the desired record and click **OK***

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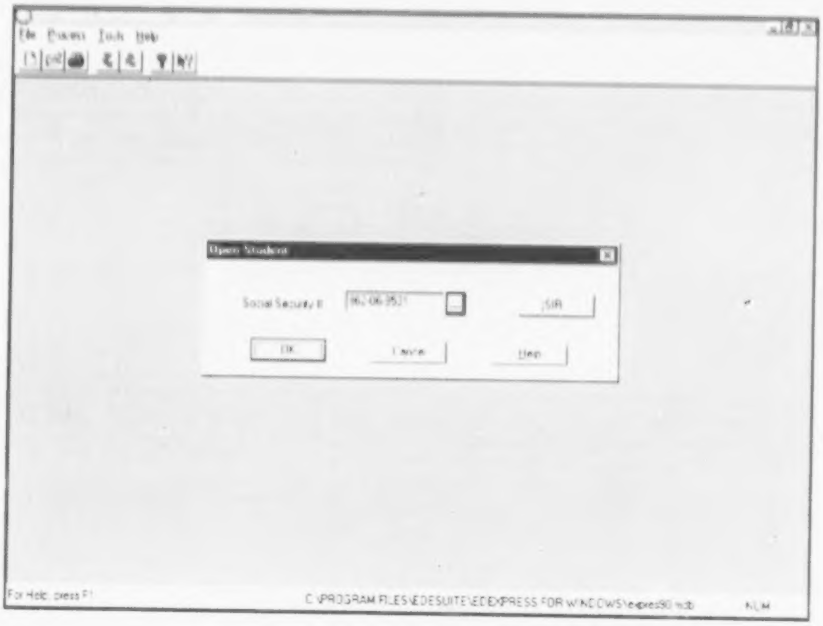
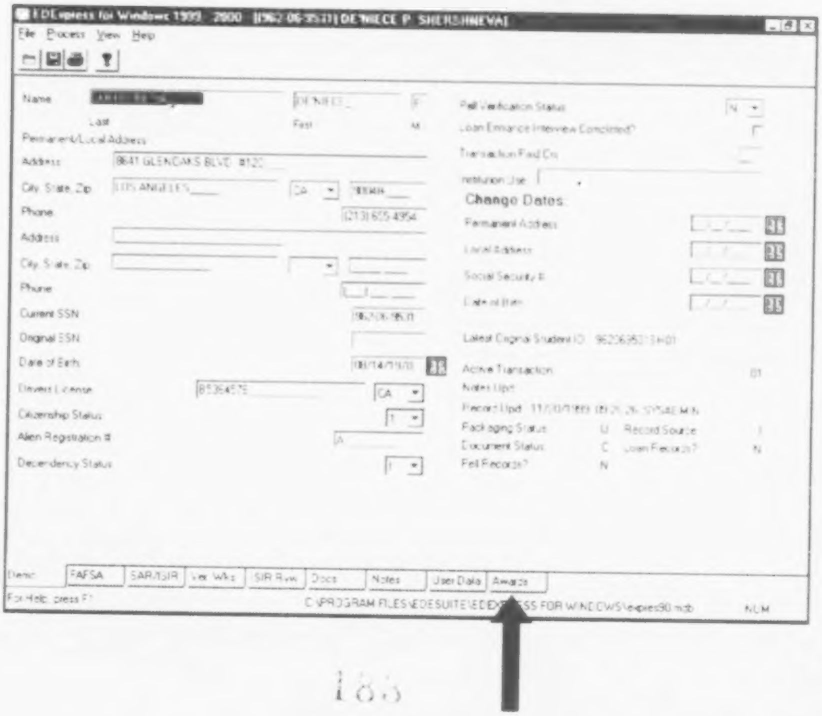
*Click **OK** to open the student's record*


File Process Tools Help
Open Student
OK
Cancel
Help
ISIR

Social Security #: 962-06-3531

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

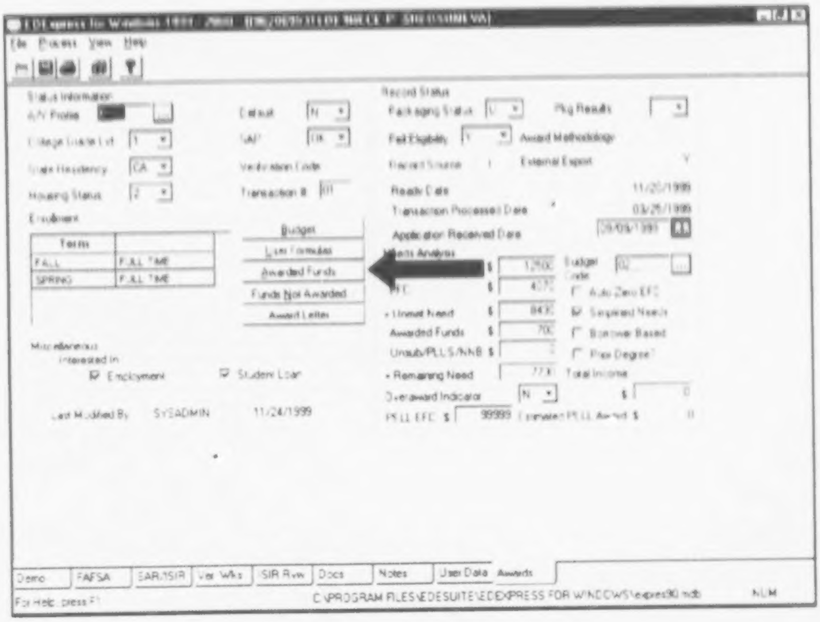
*Click the **Awards** tab*


File Process View Help
Change Dates
Permanent Address
Local Address
Social Security #
Date of Birth
Loan Entrance Interview Completed?
Transaction Paid Cn
Institution Use
Demo
FAFSA
SAR/ISIR
Ver. Wks
SIR Rvw
Docs
Notes
User Data
Awards

EDExpress for Windows 1999 - 2000 - [962-06-3531] DENIECE P SHERSHNEVA

Name: [illegible] DENIECE P (Last, First, M)
Permanent/Local Address
Address: 8641 GLENOAKS BLVD #120
City, State, Zip: LOS ANGELES CA [illegible]
Phone: (213) 655-4954
Current SSN: 962-06-3531
Date of Birth: 08/14/1970
Drivers License: B5364575 CA
Citizenship Status: 1
Alien Registration #: A
Dependency Status: I
Pell Verification Status: N
Latest Original Student ID: 962063531SH01
Active Transaction: 01
Notes Upd:
Record Upd: 11/30/1998 [illegible] SYSADMIN
Packaging Status: U Record Source: I
Document Status: C Loan Records?: N
Pell Records?: N

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM



File Process View Help
Budget
Loan Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

Status Information
College Grade Lvl 1
State Residency CA
Housing Status 2
Default N
SAP OK
Transaction # 01
Record Status
Packaging Status U
Pkg Results
Fed Eligibility Y
Award Methodology
External Export Y
Ready Date 11/20/1999
Transaction Processed Date 03/25/1999
Enrollment

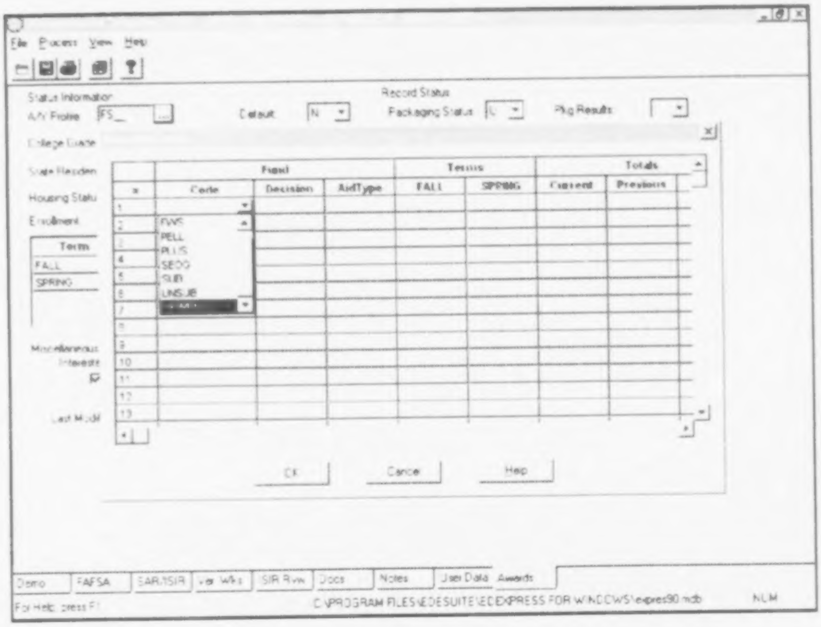
Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☑ Student Loan
Last Modified By SYSADMIN 11/24/1999
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prev Degree?
Unmet Need
Awarded Funds
Unsub/PLUS/NNB
Remaining Need
Total Income
Overaward Indicator N
PELL EFC $ 99999
Estimated PELL Award $
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

In this example, you have received notification that the student has been awarded an outside scholarship from the local women's club.

You record this as an awarded fund before you package the record so that it will accurately reflects the remaining need after packaging.

To do this, click the **Awarded Funds** button.



File Process View Help
FWS
PELL
PLUS
SEOG
SUB
UNSUB
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

Status Information
A/V Profile FS
Default N
Record Status
Packaging Status U
Pkg Results

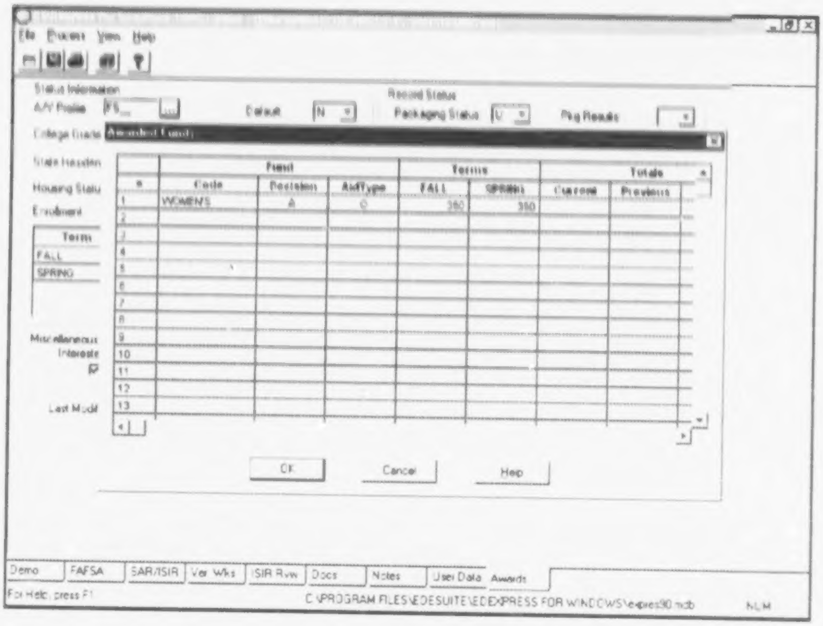
	Fund			Terms		Totals	
#	Code	Decision	AidType	FALL	SPRING	Current	Previous
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Click the Fund Code field to select the fund **WOMEN'S**.

*Type amounts for each term awarded. The software automatically fills the aid type, number, and a default value of **A** (Accepted) for the decision.*

*Click **OK**.*


File
Process
View
Help
Status Information
A/Y Profile
FS
Default
N
Record Status
Packaging Status
U
Pkg Results
College Grade
Awarded Funds
State Residen
Housing Statu
Enrollment
Term
FALL
SPRING
Miscellaneous
Interests
Last Modif
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

	Fund			Terms		Totals	
#	Code	Decision	AidType	FALL	SPRING	Current	Previous
1	WOMENS	A	O	350	350		
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

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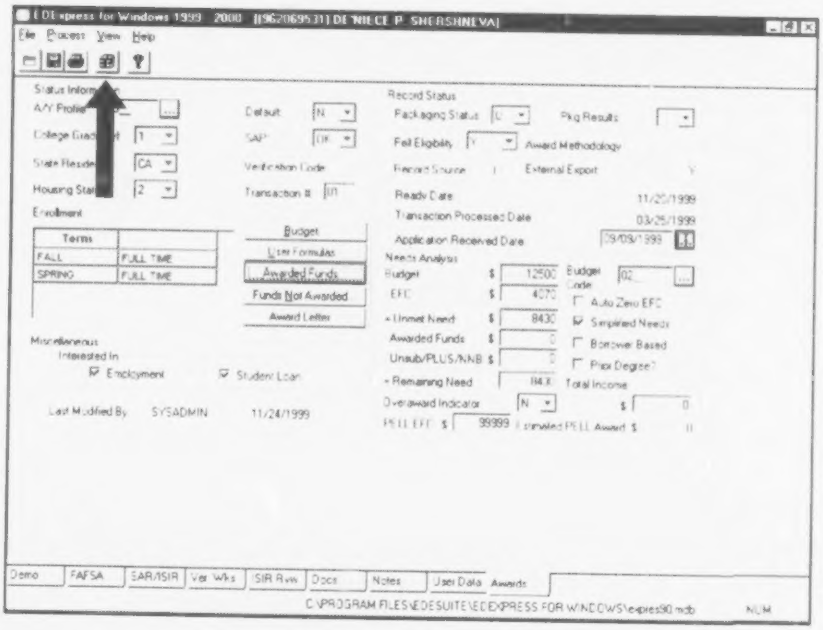
The total awarded funds amount now reflects the scholarship we just entered.

The remaining need is also adjusted.

*Now you're ready to package this student. Click the **Packaging** button shown on the tool bar.*


File
Process
View
Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
NUM

EDExpress for Windows 1999 - 2000 - [[962069531] DE'NIECE P. SHERSHNEVA]

Status Information

A/Y Profile

College Grade Level: 1

State Residence: CA

Housing Status: 2

Default: N

SAP: OK

Verification Code

Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment ☑ Student Loan

Last Modified By SYSADMIN 11/24/1999

Record Status

Packaging Status: U

Pkg Results

Pell Eligibility: Y

Award Methodology

Record Source: I

External Export: Y

Ready Date: 11/25/1999

Transaction Processed Date: 03/25/1999

Application Received Date: 09/09/1999

Needs Analysis

Budget $ 12500

Budget Code: 02

EFC $ 4070

☐ Auto Zero EFC

= Unmet Need $ 8430

☑ Simplified Needs

Awarded Funds $ 0

☐ Borrower Based

Unsub/PLUS/NNB $ 0

☐ Prior Degree?

= Remaining Need 8430

Total Income $ 0

Overaward Indicator: N

PELL EFC $ 99999

Estimated PELL Award $ 0

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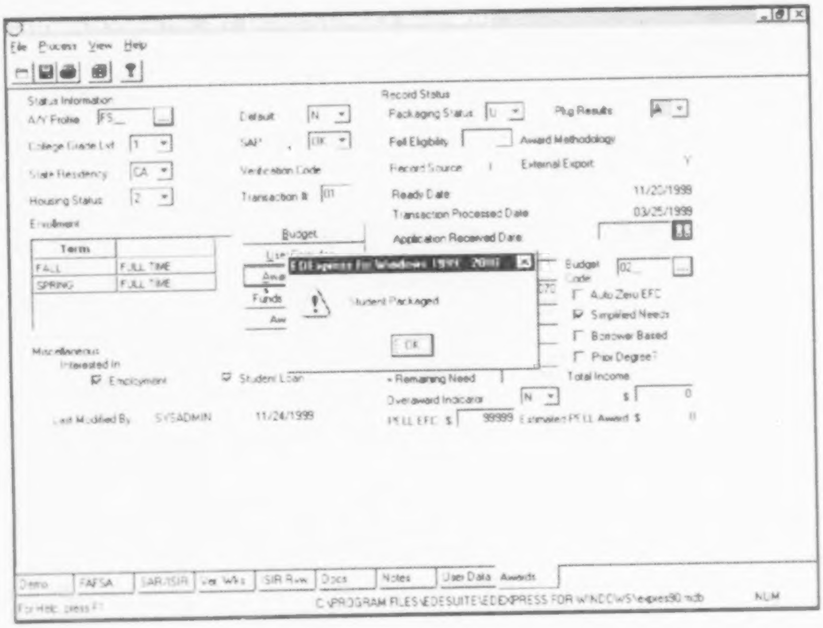

File Process View Help
Status Information
Record Status
Enrollment
Miscellaneous
Budget
Awa
Funds
Aw
OK
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards

EDExpress for Windows 1999 - 2000

Student Packaged

A/Y Profile: FS

College Grade Lvl: 1

State Residency: CA

Housing Status: 2

Default: N

SAP: OK

Verification Code

Transaction #: 01

Packaging Status: U

Pkg Results: A

Pell Eligibility

Award Methodology

Record Source: I

External Export: Y

Ready Date: 11/20/1999

Transaction Processed Date: 03/25/1999

Application Received Date

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget Code: 02

☐ Auto Zero EFC

☑ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

Interested In: ☑ Employment ☑ Student Loan

- Remaining Need

Total Income: $ 0

Overaward Indicator: N

PELL EFC: $ 99999

Estimated PELL Award $ 0

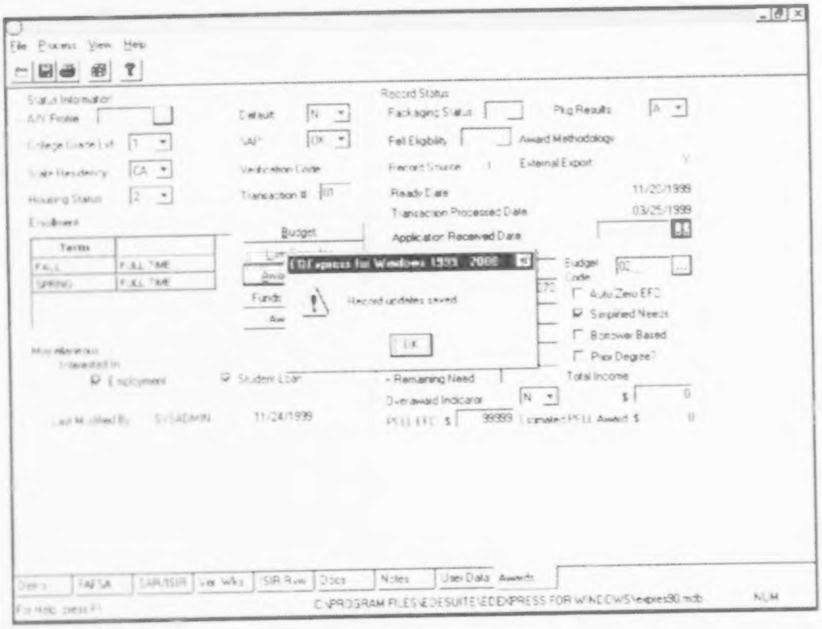
Last Modified By: SYSADMIN 11/24/1999

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

NUM

Click **OK** to continue.


File Process View Help
Status Information
Record Status
Enrollment
Miscellaneous
Budget
Awa
Funds
Aw
OK
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards

EDExpress for Windows 1999 - 2000

Record updates saved

A/Y Profile

College Grade Lvl: 1

State Residency: CA

Housing Status: 2

Default: N

SAP: OK

Verification Code

Transaction #: 01

Packaging Status

Pkg Results: A

Pell Eligibility

Award Methodology

Record Source: I

External Export: Y

Ready Date: 11/20/1999

Transaction Processed Date: 03/25/1999

Application Received Date

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget Code: 02

☐ Auto Zero EFC

☑ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

Interested In: ☑ Employment ☑ Student Loan

- Remaining Need

Total Income: $ 0

Overaward Indicator: N

PELL EFC: $ 99999

Estimated PELL Award $ 0

Last Modified By: SYSADMIN 11/24/1999

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

NUM

Click **OK** to see the results.

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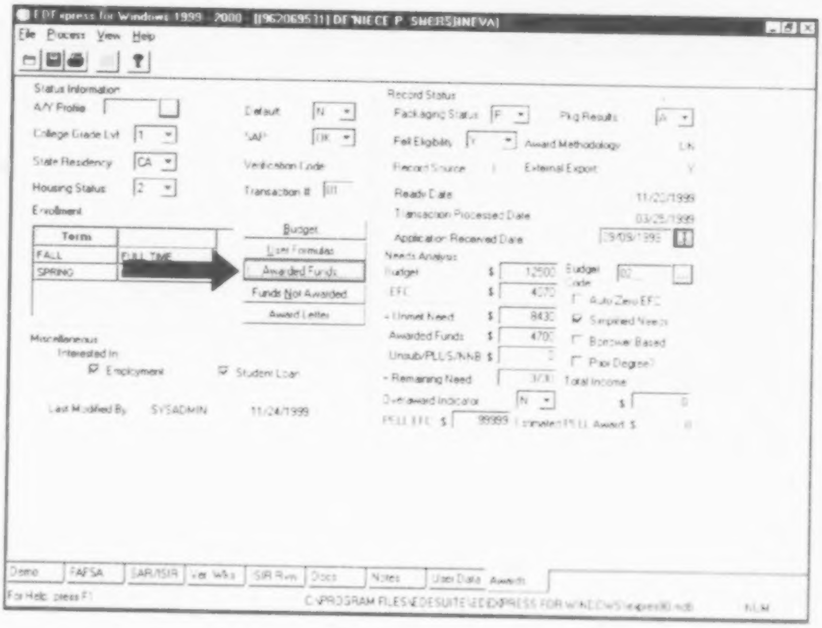
What has changed? Look at Awarded Funds, Remaining Need, Pkg Results, and Award Methodology.

*Click the **Awarded Funds** button to view the funds awarded.*



EDExpress for Windows 1999 - 2000 - [196206953] DE'NIECE P SHERSHNEVA]

Status Information
A/Y Profile:
College Grade Lvl: 1
State Residency: CA
Housing Status: 2
Default: N
SAP: OK
Verification Code:
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	

Record Status
Packaging Status: F
Pkg Results: A
Pell Eligibility: Y
Award Methodology: UN
Record Source: I
External Export: Y
Ready Date: 11/22/1999
Transaction Processed Date: 03/25/1999
Application Received Date: 03/09/1999

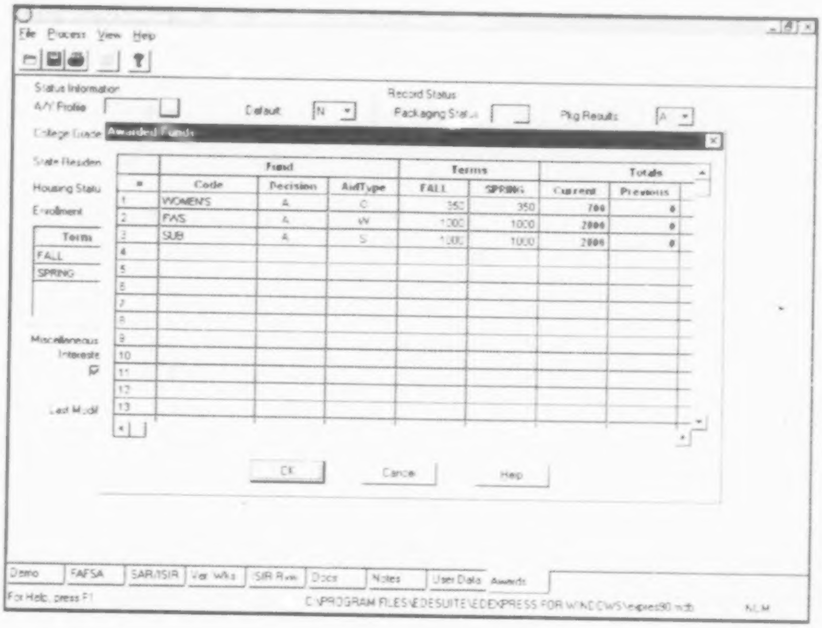
Needs Analysis
Budget $ 12500
Budget Code: 02
EFC $ 4070
☐ Auto Zero EFC
= Unmet Need $ 8430
☑ Simplified Needs
Awarded Funds $ 4700
☐ Borrower Based
Unsub/PLUS/NNB $ 0
☐ Prior Degree?
= Remaining Need 3730
Total Income $ 0
Overaward Indicator: N
PELL EFC $ 99999
Estimated PELL Award $ 0

Miscellaneous
Interested In
☑ Employment ☑ Student Loan

Last Modified By: SYSADMIN 11/24/1999

File
Process
View
Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.ndb
NUM

All funds are listed with the amounts per term and the total for all terms.



Record Status
Default: N
Packaging Status:
Pkg Results: A

Awarded Funds

	Fund			Terms		Totals	
#	Code	Decision	AidType	FALL	SPRING	Current	Previous
1	WOMEN'S	A	O	350	350	700	0
2	FWS	A	W	1000	1000	2000	0
3	SUB	A	S	1000	1000	2000	0
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

File
Process
View
Help
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.ndb
NUM

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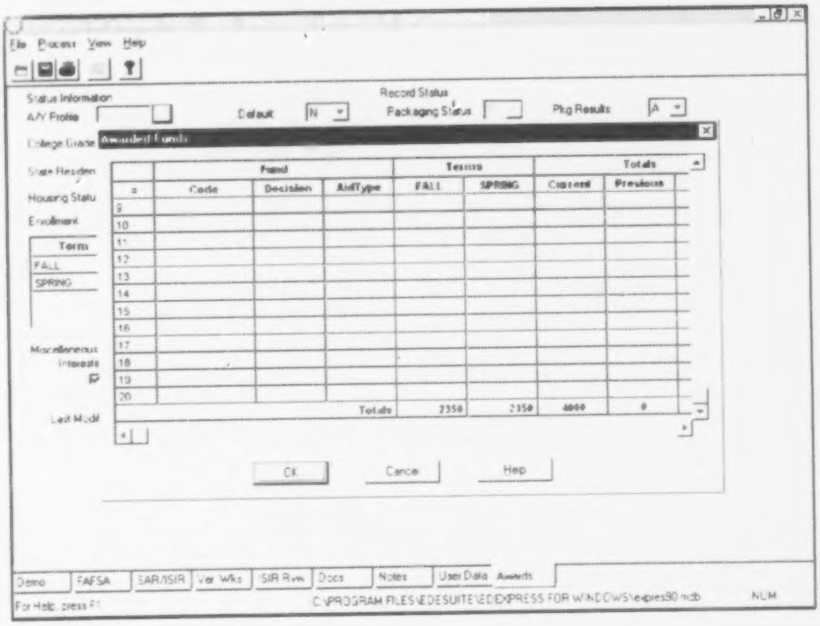

File
Process
View
Help
Status Information
A/Y Profile
Record Status
Packaging Status
College Grade
State Residen
Housing Statu
Enrollment
Miscellaneous
Interests
Last Modif
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

Default: N

Pkg Results: A

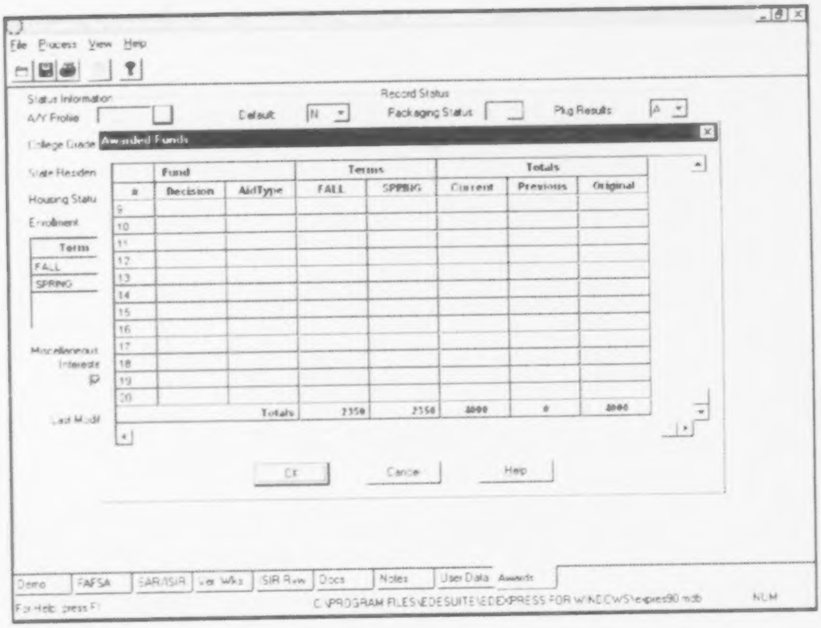
Term
FALL
SPRING

Awarded Funds

	Fund			Terms		Totals	
#	Code	Decision	AidType	FALL	SPRING	Current	Previous
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
			Totals	2350	2350	4000	0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Use the horizontal and vertical scroll bars to view the information


File
Process
View
Help
Status Information
A/Y Profile
Record Status
Packaging Status
College Grade
State Residen
Housing Statu
Enrollment
Miscellaneous
Interests
Last Modif
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

Default: N

Pkg Results: A

Term
FALL
SPRING

Awarded Funds

	Fund		Terms		Totals		
#	Decision	AidType	FALL	SPRING	Current	Previous	Original
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
		Totals	2350	2350	4000	0	4000

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The total of all funds is displayed at the bottom right.

*Click **OK** to close.*

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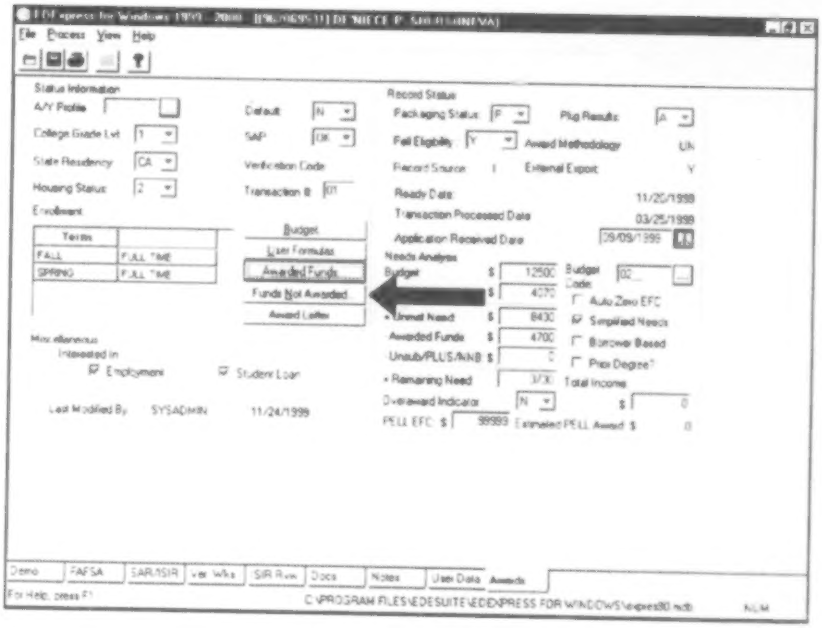
*Click the **Funds Not Awarded** button to see if any funds in the award methodology were not included and the reason why.*



EDExpress for Windows 1999 - 2000

File
Process
View
Help

Status Information
A/Y Profile
College Grade Lvl 1
State Residency CA
Housing Status 2
Default N
SAP OK
Verification Code
Transaction # 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter

Miscellaneous
Interested in
☑ Employment
☑ Student Loan

Last Modified By SYSADMIN 11/24/1999

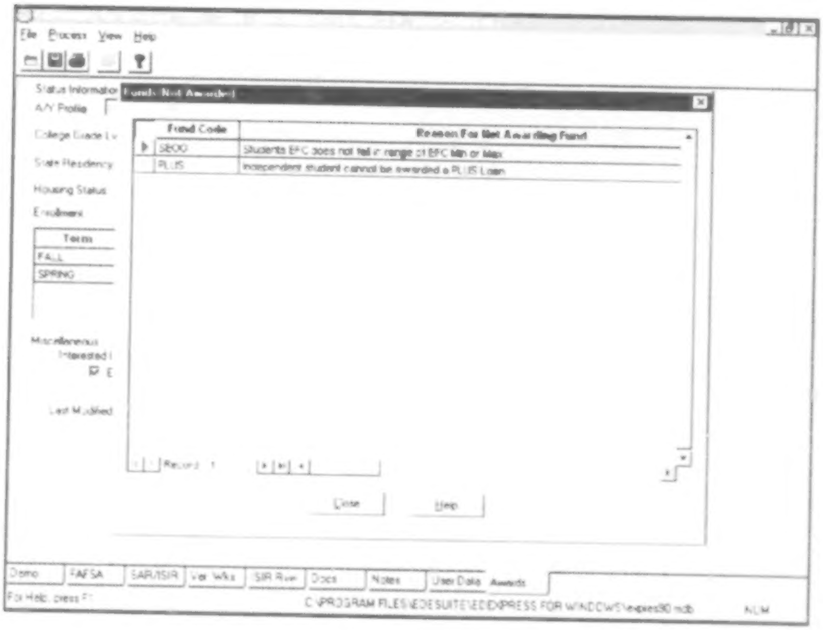
Record Status
Packaging Status P
Pkg Results A
Pell Eligibility Y
Award Methodology UN
Record Source I
External Export Y
Ready Date 11/20/1999
Transaction Processed Date 03/25/1999
Application Received Date 09/09/1999

Needs Analysis
Budget $ 12500
Budget Code 02
$ 4070
☐ Auto Zero EFC
= Unmet Need $ 8430
☑ Simplified Needs
Awarded Funds $ 4700
☐ Borrower Based
Unsub/PLUS/NNB $ 0
☐ Prior Degree?
= Remaining Need 3730
Total Income $ 0
Overaward Indicator N
PELL EFC $ 99999
Estimated PELL Award $ 0

Demo
FAFSA
SAR/ISIR
Ver Wks
SIR Rvw
Docs
Notes
User Data
Awards

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

In this record no funds in the methodology were awarded.



Funds Not Awarded

Fund Code	Reason For Not Awarding Fund
SEOG	Students EFC does not fall in range of EFC Min or Max
PLUS	Independent student cannot be awarded a PLUS Loan

Record: 1
Close
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
SIR Rvw
Docs
Notes
User Data
Awards

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

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Calculating the Award

How Does the Software Apply Funds?

The following table illustrates the allocation funds based on the award methodology used, assuming 100% for both gift and self-help aid. This is a generic example using the award methodology.

Budget = $10,495
EFC = 0
Need = $10,495

Fund Code	Award Range	EFC Range	Award Amount	Remaining Need
				10,495
Pell	0-3125	0-2800	3125	7370
SEOG	200-2000	0-2500	2000	5370
Work	200-5000	0-99999	5000	370
Subsidized Stafford	200-9999	0-99999	370	0
PLUS	200-9999	0-99999	0	0

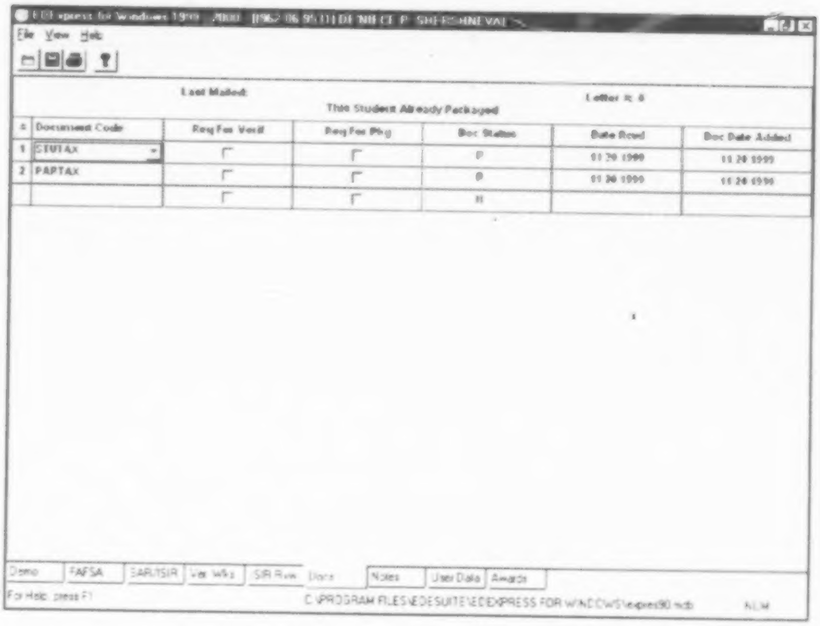
Why Didn't It Award As Expected?

- Did you create the fund you were trying to award?
- Do all of your funds have a balance to award?
- Are all required documents recorded as received or waived?
- Did you define a minimum and maximum award range for your fund in the award methodology?
- Is there a query restriction at the fund level?
- Did your student(s) meet the criteria of the query you used for your award methodology?

Adding a Document Manually

Since this student has been awarded a subsidized Stafford, she will need to complete and return a promissory note. We use document tracking to create a request for the promissory note.

*Click the **Docs** tab.*



File View Help
Demo
FAFSA
SAR/ISIR
Ver Wks
SIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

Last Mailed:

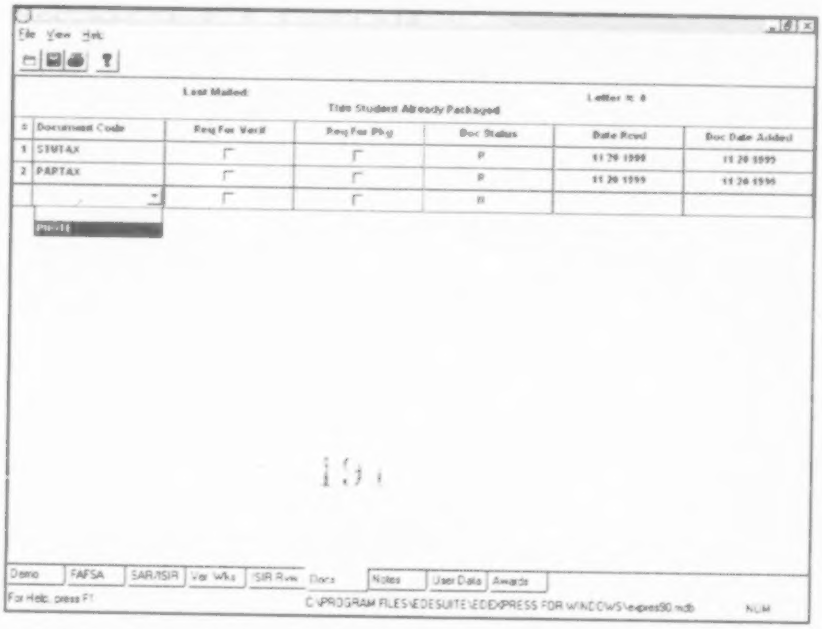
Letter #: 0

This Student Already Packaged

#	Document Code	Req For Verif	Req For Pkg	Doc Status	Date Rcvd	Doc Date Added
1	STUTAX	☐	☐	P	11 20 1999	11 20 1999
2	PAPTAX	☐	☐	P	11 20 1999	11 20 1999
		☐	☐	R		

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Click on the Document field and select the code **PNOTE**.*



File View Help
PNOTE
Demo
FAFSA
SAR/ISIR
Ver Wks
SIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

Last Mailed:

Letter #: 0

This Student Already Packaged

#	Document Code	Req For Verif	Req For Pkg	Doc Status	Date Rcvd	Doc Date Added
1	STUTAX	☐	☐	P	11 20 1999	11 20 1999
2	PAPTAX	☐	☐	P	11 20 1999	11 20 1999
		☐	☐	R		

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

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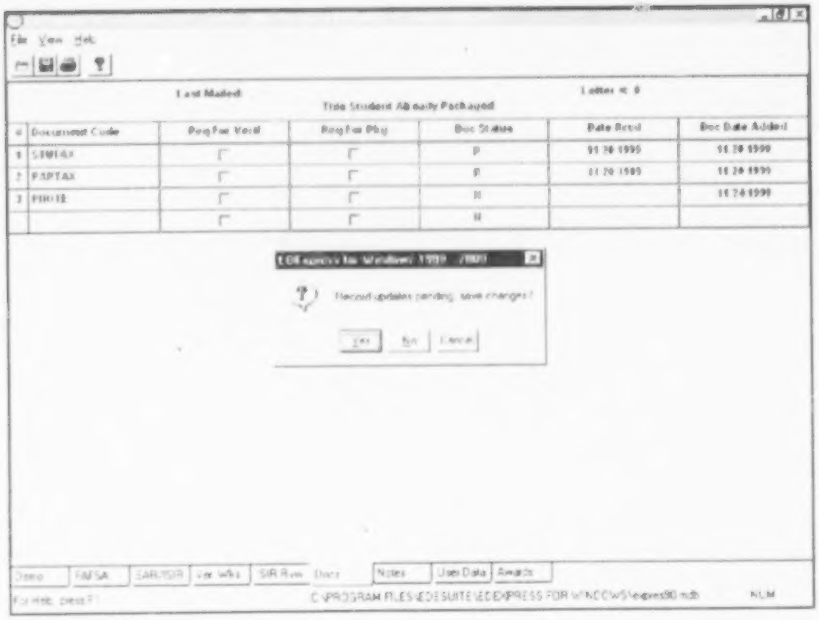

File View Help
Last Mailed:
Letter #: 0
Demo
FAFSA
SAR/ISIR
Ver Wks
SIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM
EDExpress for Windows 1999 - 2000
Yes
No
Cancel

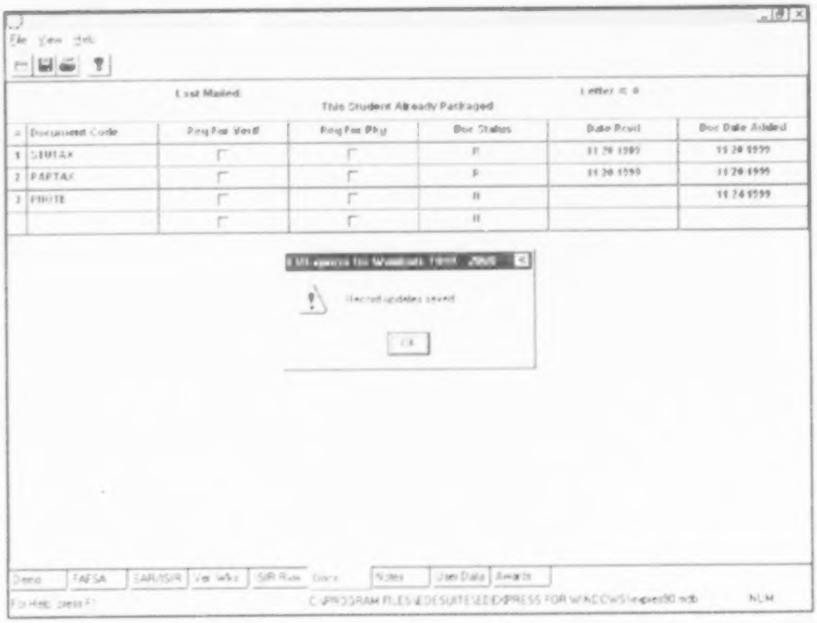
This Student Already Packaged

#	Document Code	Req For Verif	Req For Pkg	Doc Status	Date Rcvd	Doc Date Added
1	STUTAX	☐	☐	P	11 20 1999	11 20 1999
2	PARTAX	☐	☐	P	11 20 1999	11 20 1999
3	[illegible]	☐	☐	N		11 24 1999
		☐	☐	N		

Record updates pending, save changes?

Click **File/Close** to close the record. EDExpress reminds you to save your changes.

Click **Yes**.


File View Help
Last Mailed:
Letter #: 0
Demo
FAFSA
SAR/ISIR
Ver Wks
SIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM
EDExpress for Windows 1999 - 2000
OK

This Student Already Packaged

#	Document Code	Req For Verif	Req For Pkg	Doc Status	Date Rcvd	Doc Date Added
1	STUTAX	☐	☐	P	11 20 1999	11 20 1999
2	PARTAX	☐	☐	P	11 20 1999	11 20 1999
3	[illegible]	☐	☐	N		11 24 1999
		☐	☐	N		

Record updates saved

Click **OK** to continue.

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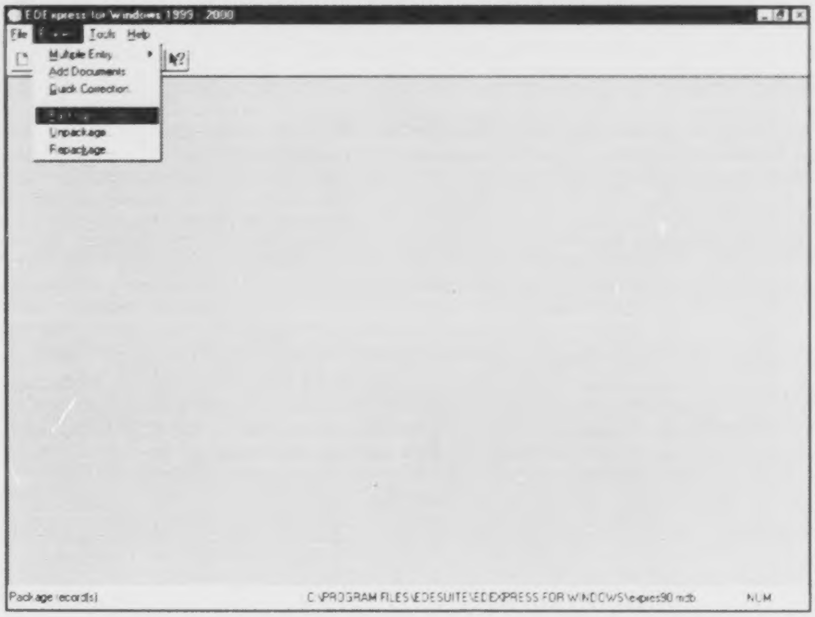
Global Packaging

In this section, you learn how to package a group of students using the global process.

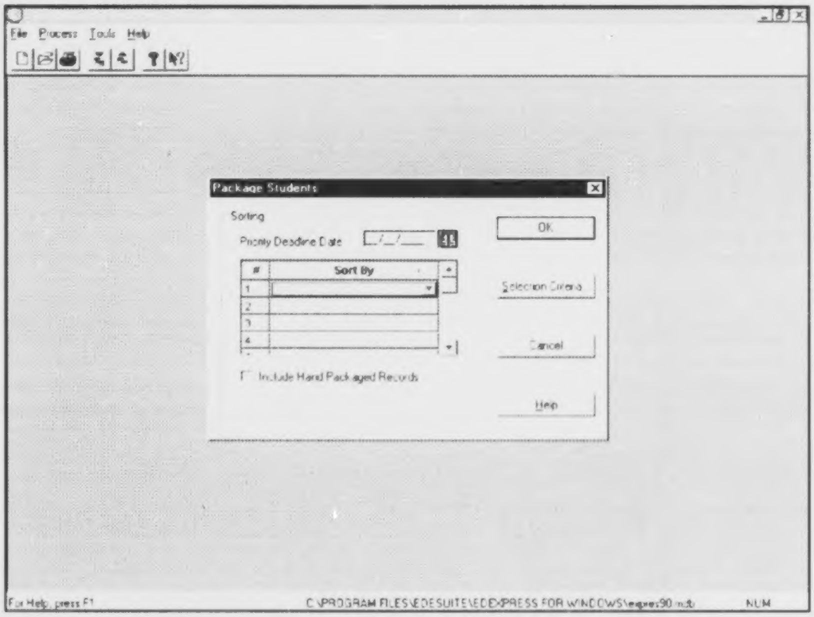
*To package a group of records select **Process/Package** from the menu bar.*


EDExpress for Windows 1999 - 2000
File
Process
Tools
Help
Multiple Entry
Add Documents
Quick Correction
Package
Unpackage
Repackage

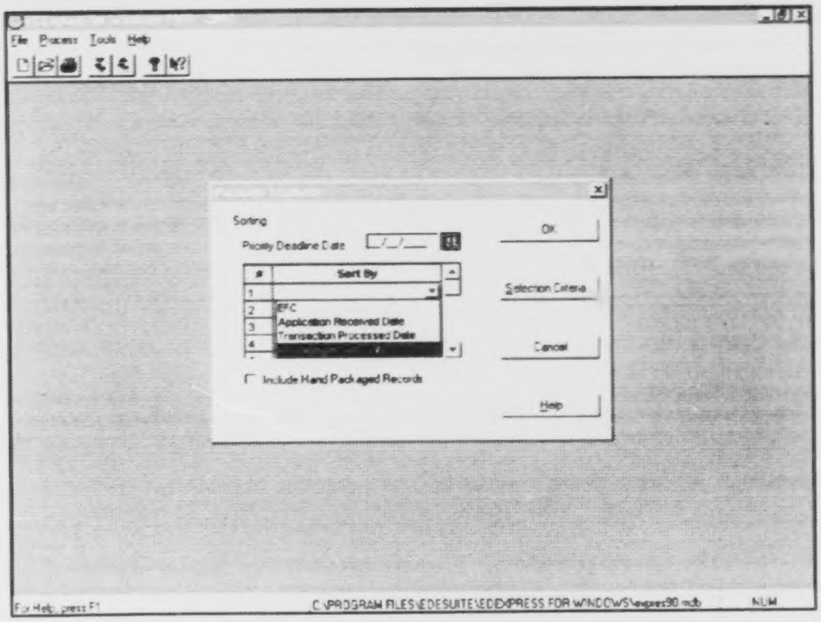
Package record(s) C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

A dialog box displays allowing you to sort by priority or by selection criteria.

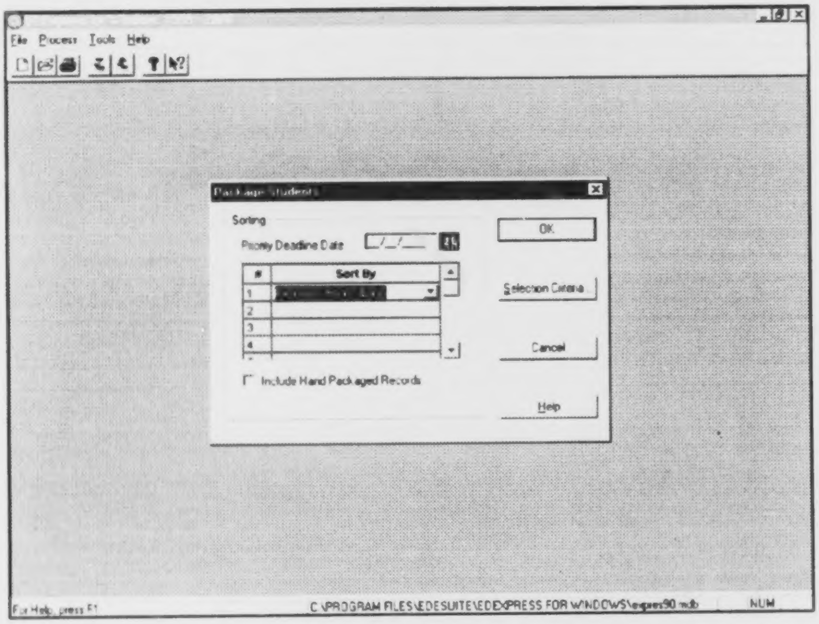
*Click the **down arrow** in the first Sort By field to see a list of selections.*


File
Process
Tools
Help
Package Students
Sorting
Priority Deadline Date
__/__/____
#
Sort By
1
2
3
4
☐ Include Hand Packaged Records
OK
Selection Criteria
Cancel
Help

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM


File Process Tools Help
Sorting
Priority Deadline Date
#
Sort By
1
2
3
4
EFC
Application Received Date
Transaction Processed Date
☐ Include Hand Packaged Records
OK
Selection Criteria
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

In this example, we will sort records by the Packaging Ready Date.


File Process Tools Help
Package Students
Sorting
Priority Deadline Date
#
Sort By
1
2
3
4
☐ Include Hand Packaged Records
OK
Selection Criteria
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

We will also package a specific group of students.

*Click **Selection Criteria**.*

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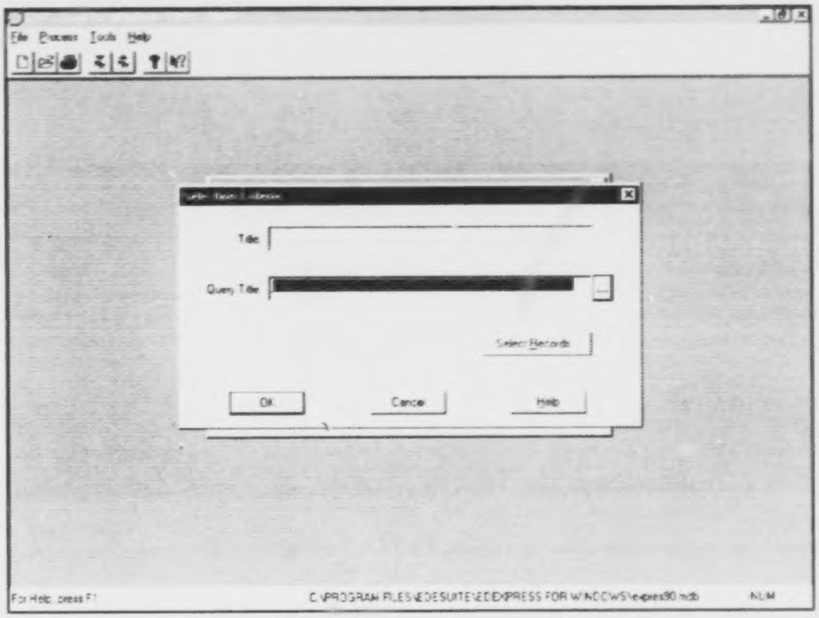
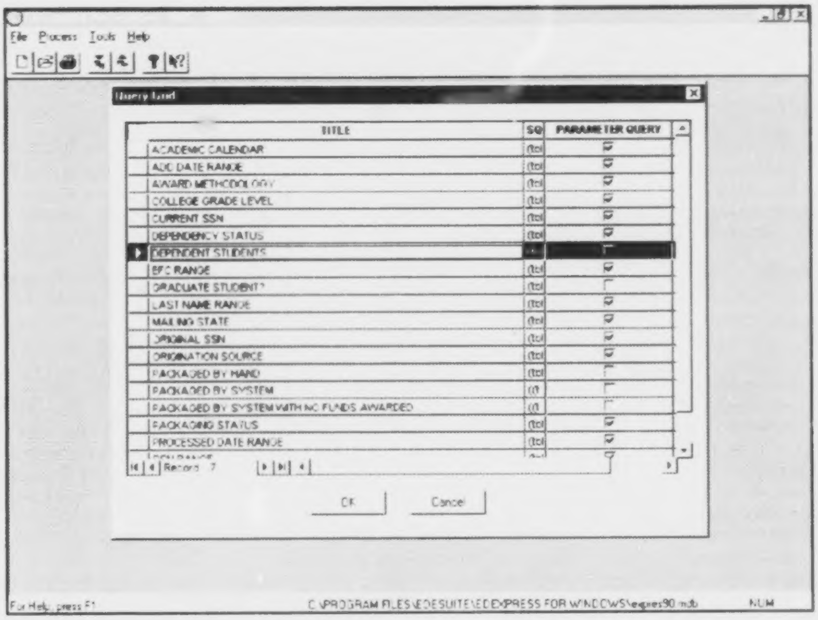
The Selection Criteria box displays. You can specify which records are included in the process by using the predefined criteria or a query.

*If you want to package all records that are ready, select **OK**.*


File Process Tools Help
Title
Query Title
Select Records
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

In this example we package dependent students.

*Click **OK** to continue.*


File Process Tools Help
Query Load
OK
Cancel
Record: 7
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

TITLE	SQ	PARAMETER QUERY
ACADEMIC CALENDAR	(tbl	☑
ADD DATE RANGE	(tbl	☑
AWARD METHODOLOGY	(tbl	☑
COLLEGE GRADE LEVEL	(tbl	☑
CURRENT SSN	(tbl	☑
DEPENDENCY STATUS	(tbl	☑
DEPENDENT STUDENTS		☐
EFC RANGE	(tbl	☑
GRADUATE STUDENT?	(tbl	☐
LAST NAME RANGE	(tbl	☑
MAILING STATE	(tbl	☑
ORIGINAL SSN	(tbl	☑
ORIGINATION SOURCE	(tbl	☑
PACKAGED BY HAND	(tbl	☐
PACKAGED BY SYSTEM	(t	☐
PACKAGED BY SYSTEM WITH NO FUNDS AWARDED	(t	☐
PACKAGING STATUS	(tbl	☑
PROCESSED DATE RANGE	(tbl	☑

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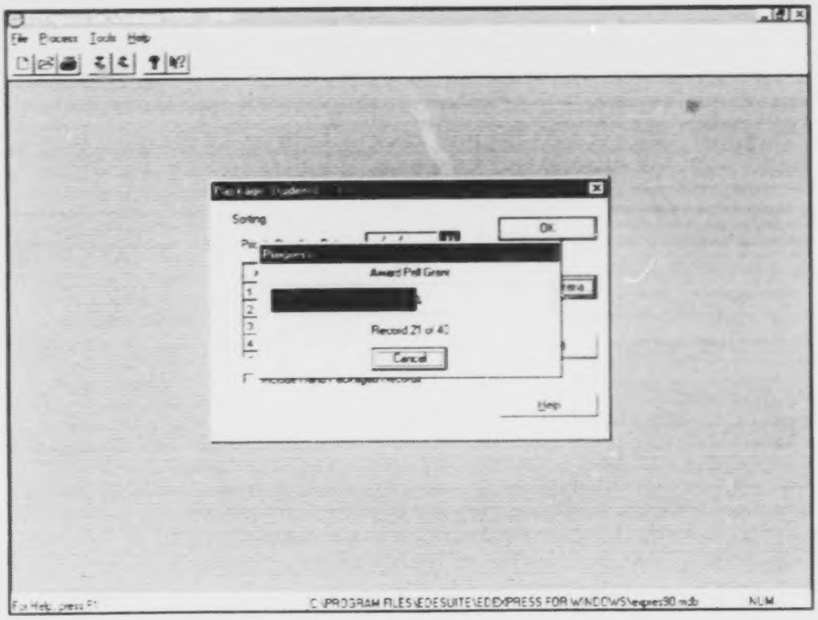
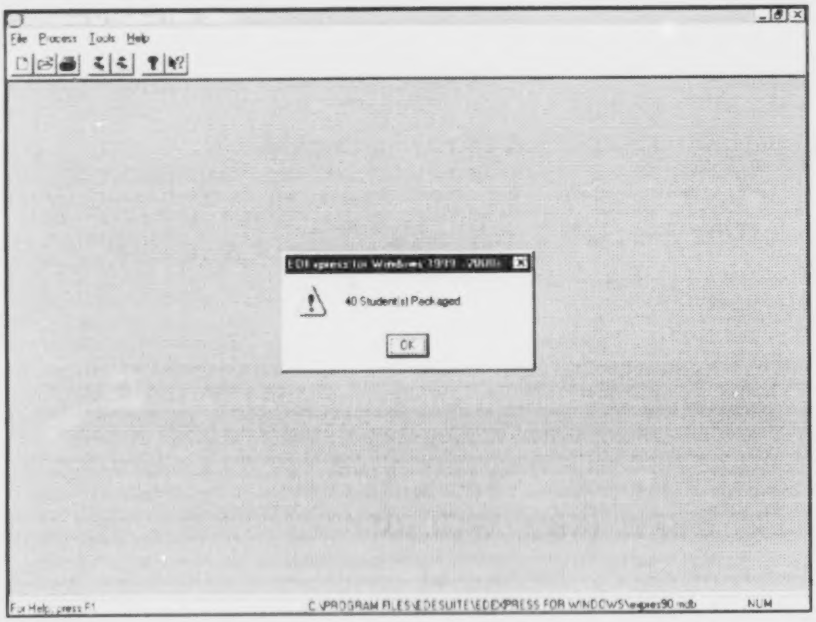

File Process Tools Help
Package Students
Sorting
OK
Progress
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Award Pell Grant

Record 21 of 40

Cancel

The software moves sequentially through the defined methodologies to determine which ones apply to the records selected.


File Process Tools Help
EDExpress for Windows (1999 - 2000)
OK
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

40 Student(s) Packaged

This box indicates the packaging process is concluded, and 5 students have been packaged.

*Click **OK**.*

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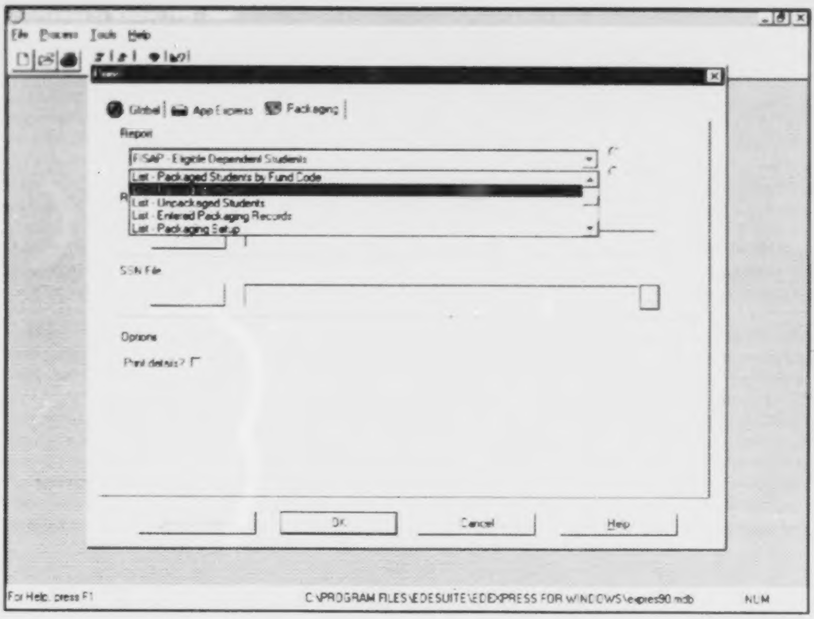
Printing a List of Packaged Records

No matter which method you use to run the packaging process, you may want to print a list to determine which students have been packaged. EDExpress provides two list options for viewing packaged summary data: Packaged Students, and Packaged Students by Fund Code.

*Select **File/Print** from the main menu.*

*Click the **Packaging** tab.*

*Click the down arrow to select the **Report: List - Packaged Students**. You can sort by SSN, last name, EFC or user-defined field.*


File
Process
Tools
Help
Global
App Express
Packaging
Report
FISAP - Eligible Dependent Students
List - Packaged Students by Fund Code
List - Unpackaged Students
List - Entered Packaging Records
List - Packaging Setup
SSN File
Options
Print details? ☐
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Tip:

Included in each of these reports is an option to print those students who have been suspended from aid.

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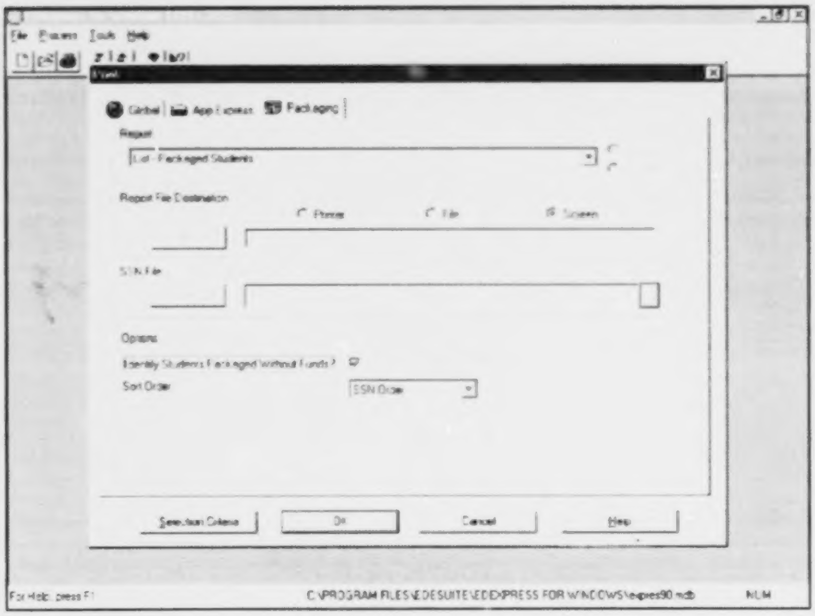

File Process Tools Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Report: List - Packaged Students

Report File Destination: ○ Printer ○ File ● Screen

SSN File

Options

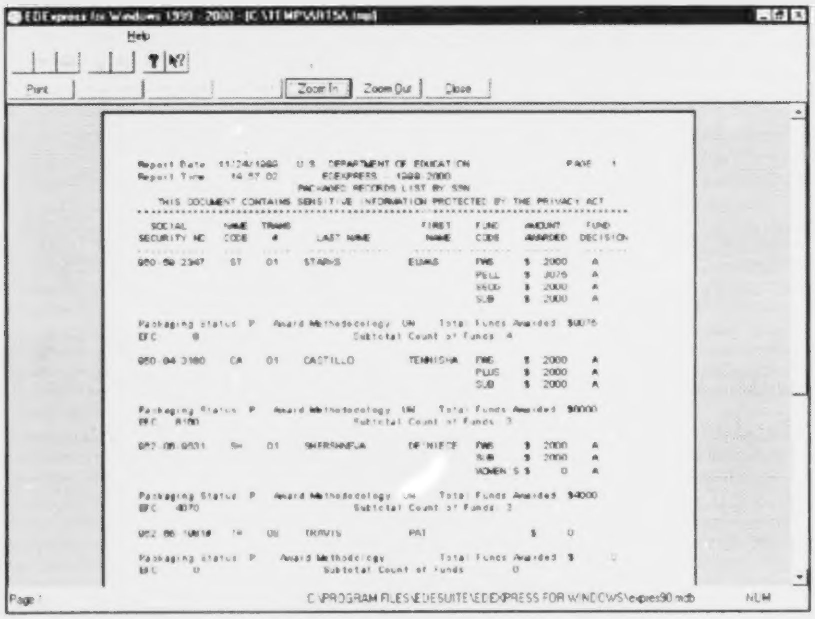
Identify Students Packaged Without Funds? ☑

Sort Order: SSN Order

In this example, all packaged records are included in the list. If you want to limit the list, use Selection Criteria.

Click ***Screen*** *to view the output to the screen.*

Click ***OK*** *to print.*


EDExpress for Windows 1999 - 2000 - [C:\TEMP\AR15A.tmp]
Help
Print
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

```
Report Date  11/24/1998   U.S. DEPARTMENT OF EDUCATION              PAGE  1
Report Time    14:57:02        EDEXPRESS - 1999-2000
                            PACKAGED RECORDS LIST BY SSN
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****************************************************************************
  SOCIAL        NAME  TRANS                           FIRST    FUND    AMOUNT    FUND
SECURITY NO     CODE    #       LAST NAME             NAME     CODE    AWARDED  DECISION

980-50-2347      ST    01     STARKS               ELIAS     FWS    $  2000      A
                                                             PELL   $  3075      A
                                                             SEOG   $  2000      A
                                                             SUB    $  2000      A

Packaging Status  P   Award Methodology  UN    Total Funds Awarded  $9075
EFC      0                         Subtotal Count of Funds  4

950-04-3180      CA    01     CASTILLO             TENNISHA  FWS    $  2000      A
                                                             PLUS   $  2000      A
                                                             SUB    $  2000      A

Packaging Status  P   Award Methodology  UN    Total Funds Awarded  $6000
EFC    8100                        Subtotal Count of Funds  3

952-08-9531      SH    01     SHERSHNEVA           DE'NIECE  FWS    $  2000      A
                                                             SUB    $  2000      A
                                                             WOMEN S $     0     A

Packaging Status  P   Award Methodology  UN    Total Funds Awarded  $4000
EFC    4070                        Subtotal Count of Funds  3

952-86-1010      TR    00     TRAVIS               PAT                  $     0

Packaging Status  P   Award Methodology        Total Funds Awarded  $     0
EFC      0                     Subtotal Count of Funds        0
```

The list provides a list of all packaged students and an award summary for each student.

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Apply What You Know

The student records have been imported and the funds have been established; it's time to package the records. Use the worksheets in this section to set up three award methodologies. In these exercises you will use the information provided to create award methodology records in EDExpress. Next, you will package students using the global packaging function and finally, you will print a list of the students that have been packaged.

Award Methodology Attributes

Methodology 1

Priority 1

Select Undergraduate Students

Self-help aid max 100% Gift aid max 75%

Funds	Priority	Award Range	EFC Range
SEOG	1	200-2000	0-2500
Work	2	200-5000	0-99999
Substaff	3	200-9999	0-99999
PLUS	4	200-9999	0-99999

Methodology 2

Priority 2

Select graduate students

Self-help aid max 100% Gift aid max 50%

Funds	Priority	Award Range	EFC Range
GBUS	1	50-2250	0-99999
Work	2	200-4500	0-99999
Substaff	3	200-9999	0-99999
Unstaff	4	200-9999	0-99999

Methodology 3

Priority 99

Select all students

Self-help aid max 100% Gift aid max 100%

Funds	Priority	Award Range	EFC Range
Substaff	1	200-9999	0-99999

Create the Records

1. Select **Tools/Setup/Packaging/Award Methodology** from the main menu.
2. Click **Add** to create a new record.
3. Type the methodology **Code**.
4. Enter a title.
5. Set the **Priority**.
6. Use % or $ or dollar amount.
7. Type the percentage for both **Self-help** and **Gift Aid Max**.
8. Select a criteria by clicking the ellipsis button, if applicable.
9. Click the first fund row to add the first fund.
10. Click the down arrow. Locate and select the fund code.
11. Type the **Fund Priority**.
12. Type the **School Min** and **Max** award amounts.
13. Type the **EFC Min** and **Max** level.
14. Move to the next row.
15. Continue until all funds have been added.
16. When complete click **Save**.

Add the second methodology following the same steps.

Package the Records

To use the global package function to package all records that are ready, select **Process/ Package** from the main menu.

The selection criteria box displays.

You package students by their year in school.

When complete a dialog box indicates how many records have been packaged and a print dialog box appears asking if you want to print a list of packaged records.

Print a List of Packaged Records

1. Select **File/Print** from the main menu.
2. Click the down arrow to select the **Report List - Packaged Students**.
3. Send the report to the **Screen**.
4. Select the **Sort Order**.
5. Click **OK**.

Create a Query

Using the worksheet on the following page, create a query for students who were packaged using the graduate student award methodology. Use **GR**in the value field.

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

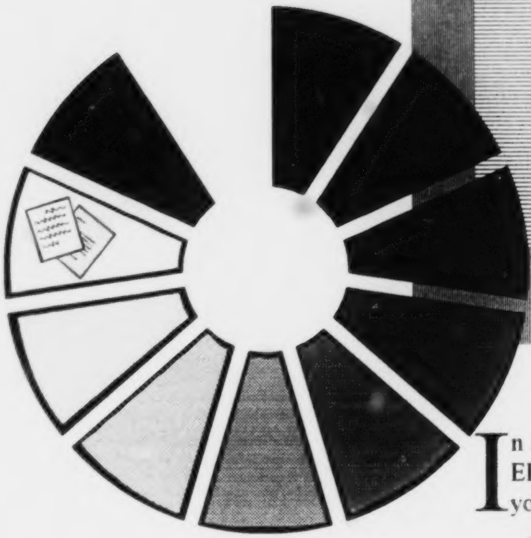
And ☐ Or ☐ Left (☐ Right) ☐

Discussion Questions for Chapter 8

1. What is the purpose of setting up distinct award methodologies?
2. What is Self-Help and Gift Aid percentage?
3. Does it matter in what order the funds are listed?
4. What are the two methods of executing the packaging process?

Chapter 9

Award Letters and Adjustments



In addition to creating, storing, and processing packaging records, EDExpress provides you with tools for printing letters and managing your data. In this chapter you learn how to:

- Create letter text for award and user-defined letters
- Print letters
- Adjust awards using the Repackage and Unpackage functions

9 Award Letters & Adjustments

Objectives

1. Create text for award and user-defined letters.
2. Repackage a student using a modified awarded fund.
3. Unpackage a single record.
4. Set flags for:
    - Fund status
    - Award letter received
    - Overaward indicator
5. Review the use of the measurement tools list of funds.

Defining Letter Text

You can use the User-Defined Text utility to define text for award letters and document tracking letters, as well as up to five general purpose letters. You have already used this utility to create Document Tracking letter text. You can use an award letter feature to inform the student of the types and amount of aid he or she has been awarded by fund description. It also requests the student to accept or decline each award.

You can use user letters to create any type of standard letter that you send to a group of students. Examples are:

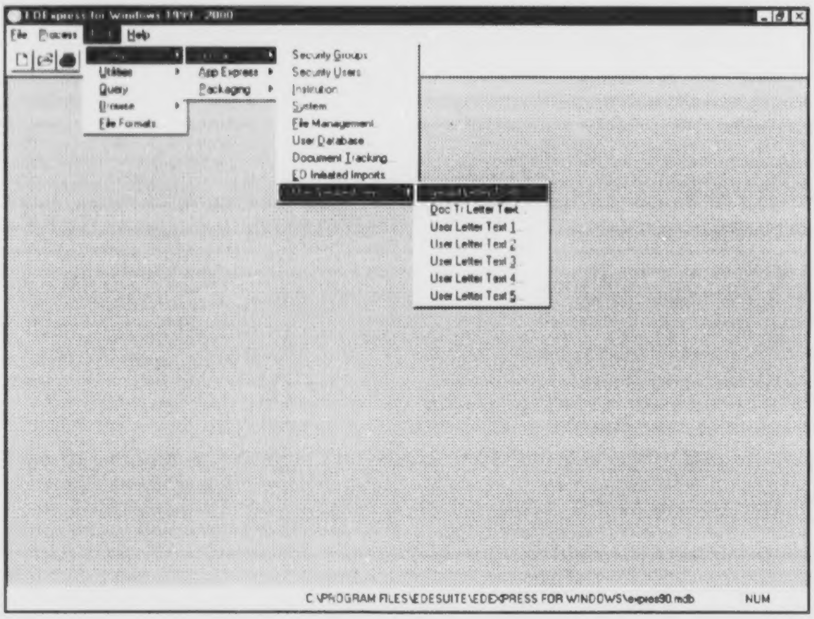
- Notifying students of a new application procedure, such as FAFSA on the Web.
- Notifying loan recipients of the times and places of entrance and exit interviews.
- Notifying students of satisfactory academic progress problems.
- Notifying work study recipients of job postings and interview dates.
- Notifying students with an award letter that reports the amount of aid awarded by fund description. It also requests the student accept or decline each award.

Creating Award Letter Text

The text that you create to appear on the award letter is in addition to general text that appears by default. Use this text to include messages specific to your institutional practices.

To create text for your Award Letters:

*Select **Tools/Setup/Global/User Defined Text/Award Letter Text** from the main menu.*

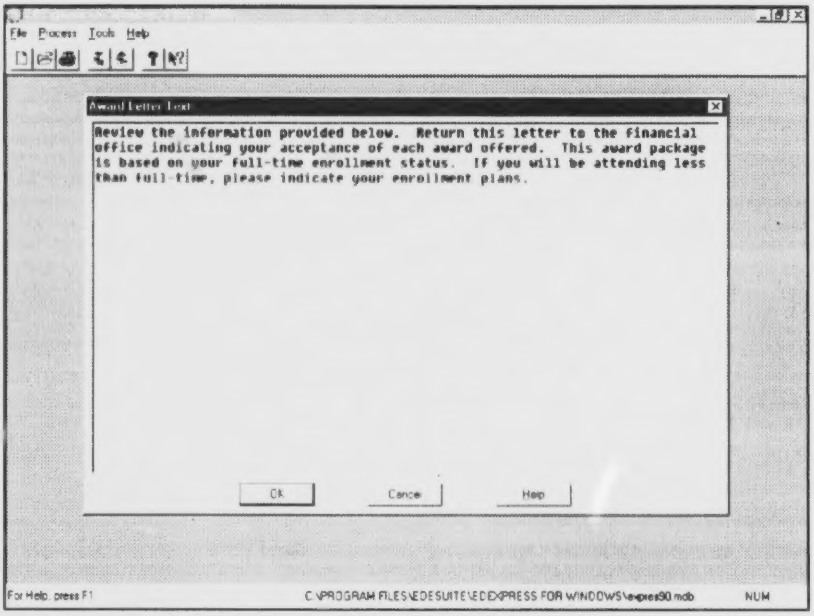

EDExpress for Windows 1999 - 2000
File
Process
Help
Utilities
Query
Browse
File Formats
App Express
Packaging
Security Groups
Security Users
Institution
System
File Management
User Database
Document Tracking
ED Initiated Imports
Doc Tr Letter Text
User Letter Text 1
User Letter Text 2
User Letter Text 3
User Letter Text 4
User Letter Text 5
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

The entry box provides for free-form entry of text.

The text that you create appears in the first page of the award letter.

Type the text as you wish it to appear.

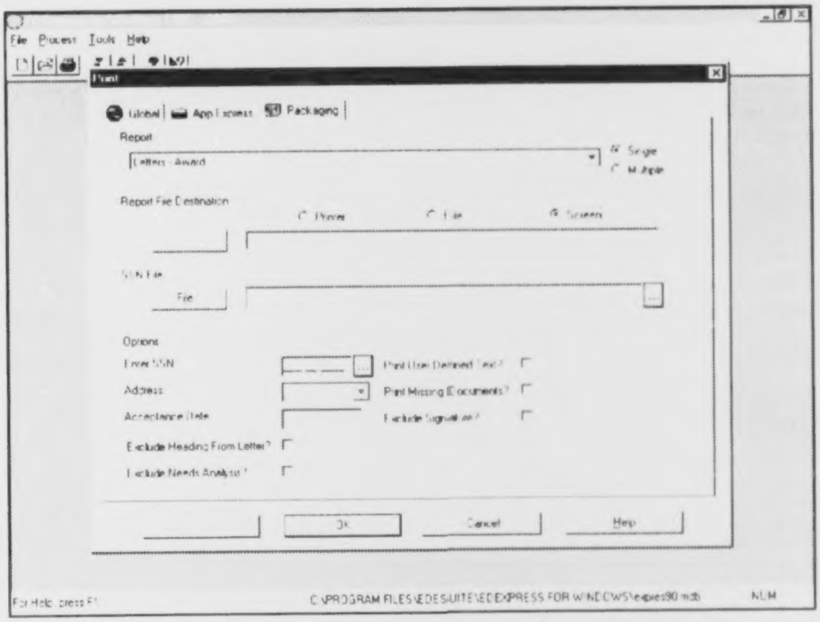
*Click **OK** when finished.*


File
Process
Tools
Help
Award Letter Text
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Review the information provided below. Return this letter to the financial office indicating your acceptance of each award offered. This award package is based on your full-time enrollment status. If you will be attending less than full-time, please indicate your enrollment plans.

BEST COPY AVAILABLE

Printing an Award Letter


File Process Tools Help
Print
Global
App Express
Packaging
Report
Single
Multiple
Report File Destination
Printer
File
Screen
SSN File
File
Options
Enter SSN
Address
Acceptance Date
Exclude Heading From Letter?
Exclude Needs Analysis?
Print User Defined Text?
Print Missing Documents?
Exclude Signature?
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Report: Letters - Award

● Single

● Screen

Select **File/Print** from the main menu

Click the **Packaging** tab

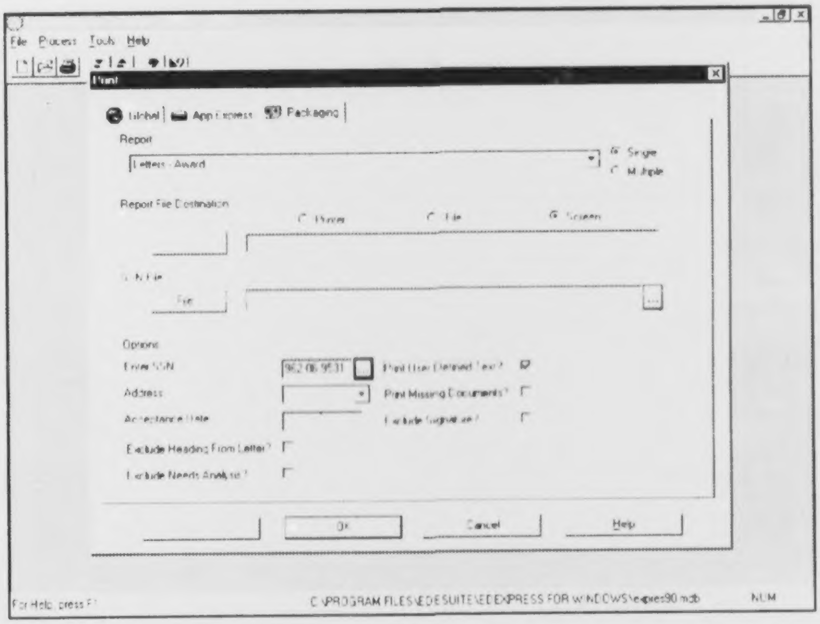
Selecting Packaging will display the Packaging print job options

As with all EDExpress Reports, you may print a single letter or multiple letters for a group of students

Click the down arrow in the Report field to view the Packaging Print options

Select **Letters-Award**

Select the destination for the print job by clicking on Printer, File, or Screen


File Process Tools Help
Print
Global
App Express
Packaging
Report
Single
Multiple
Report File Destination
Printer
File
Screen
SSN File
File
Options
Enter SSN
Address
Acceptance Date
Exclude Heading From Letter?
Exclude Needs Analysis?
Print User Defined Text?
Print Missing Documents?
Exclude Signature?
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Report: Letters - Award

● Single

● Screen

Enter SSN: 962 06 9531

Print User Defined Text? ☑

Enter SSN to select a record

Now set print parameters for the Award Letter:

Click Permanent or Local Address

You can enter an Acceptance Date to print on the letter

You can click Exclude boxes to exclude

- Heading
- Needs Analysis
- Signature

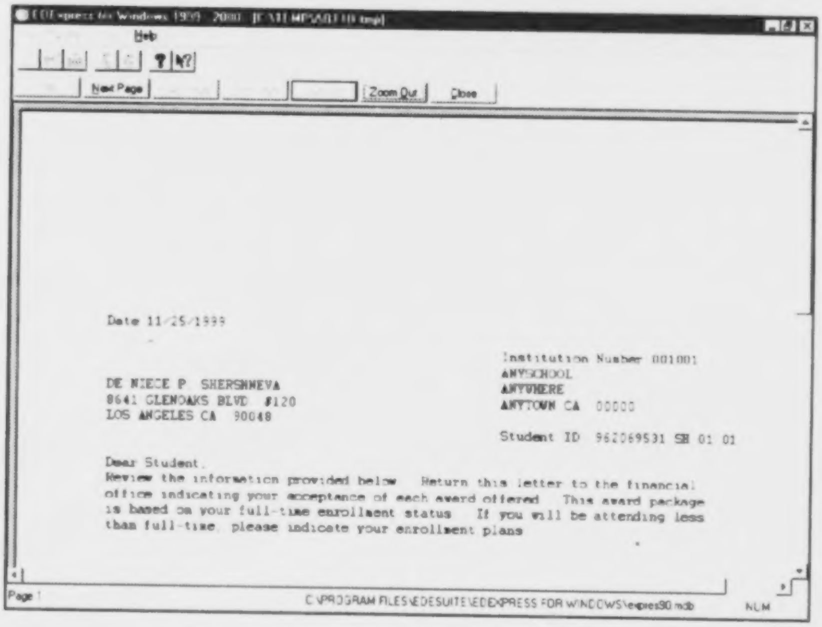
You can click Print boxes to print:

- User-Defined text
- Missing Documents

Click **OK**

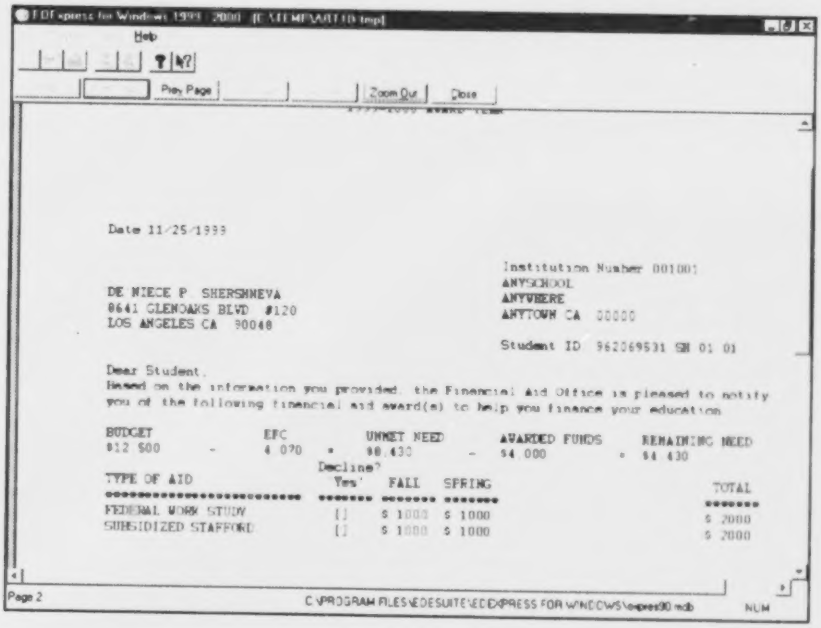
BEST COPY AVAILABLE

This is the user-defined portion of the award letter.


Help
Next Page
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

```
Date 11/25/1999

                                        Institution Number 001001
                                        ANYSCHOOL
DE NIECE P  SHERSHNEVA                  ANYWHERE
8641 GLENOAKS BLVD  #120                ANYTOWN CA  00000
LOS ANGELES CA  90048
                                        Student ID  962069531 SH 01 01

Dear Student,
Review the information provided below  Return this letter to the financial
office indicating your acceptance of each award offered  This award package
is based on your full-time enrollment status  If you will be attending less
than full-time, please indicate your enrollment plans
```

The second page includes the awarded funds.

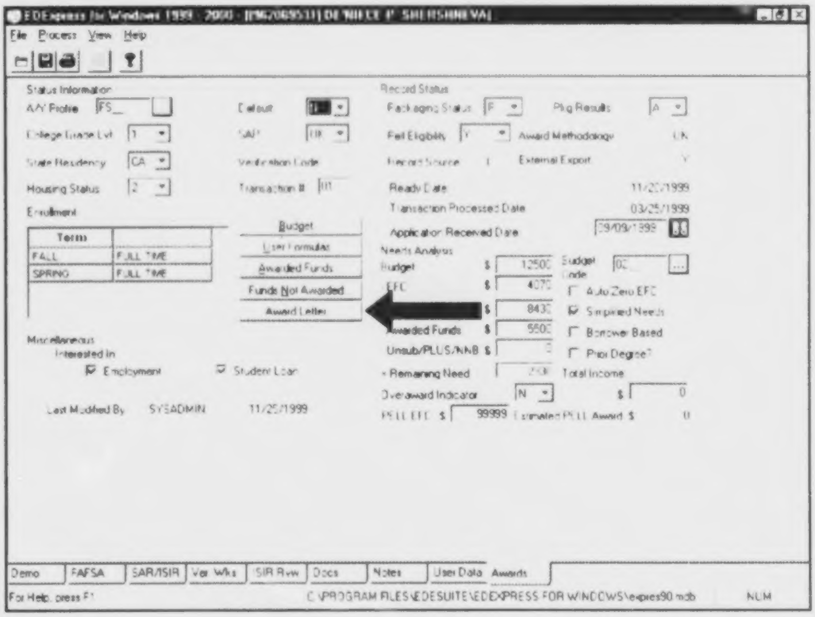

Help
Prev Page
Zoom Out
Close
Page 2
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

```
Date 11/25/1999

                                        Institution Number 001001
                                        ANYSCHOOL
DE NIECE P  SHERSHNEVA                  ANYWHERE
8641 GLENOAKS BLVD  #120                ANYTOWN CA  00000
LOS ANGELES CA  90048
                                        Student ID  962069531 SH 01 01

Dear Student,
Based on the information you provided, the Financial Aid Office is pleased to notify
you of the following financial aid award(s) to help you finance your education

BUDGET          EFC          UNMET NEED          AWARDED FUNDS       REMAINING NEED
$12 500    -    4 070   =    $8 430         -    $4 000         =    $4 430
                        Decline?
TYPE OF AID               Yes'    FALL     SPRING                                TOTAL
************************  ******* *******  *******                               *******
FEDERAL WORK STUDY         []     $ 1000   $ 1000                                $ 2000
SUBSIDIZED STAFFORD        []     $ 1000   $ 1000                                $ 2000
```

Modifying a Record Based on Received Award Letter

In this section, you will:

- Open a record
- Record the receipt of an award letter response
- Modify a fund
- Repackage the student


EDExpress for Windows 1999 - 2000
File
Process
View
Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

Status Information
A/Y Profile: FS_
College Grade Lvl: 1
State Residency: CA
Housing Status: 2
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In: ☑ Employment ☑ Student Loan
Last Modified By: SYSADMIN 11/25/1999

Record Status
Packaging Status: F
Pkg Results: A
Pell Eligibility: Y
Award Methodology: UN
Record Source: I
External Export: Y
Ready Date: 11/20/1999
Transaction Processed Date: 03/25/1999
Application Received Date: 09/09/1999

Needs Analysis
Budget: $ 12500
Budget Code: 02
EFC: $ 4070
$ 8430
Awarded Funds: $ 5500
Unsub/PLUS/NNB: $ 0
= Remaining Need: [illegible]
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Total Income: $ 0
Overaward Indicator: N
PELL EFC: $ 99999
Estimated PELL Award: $ 0

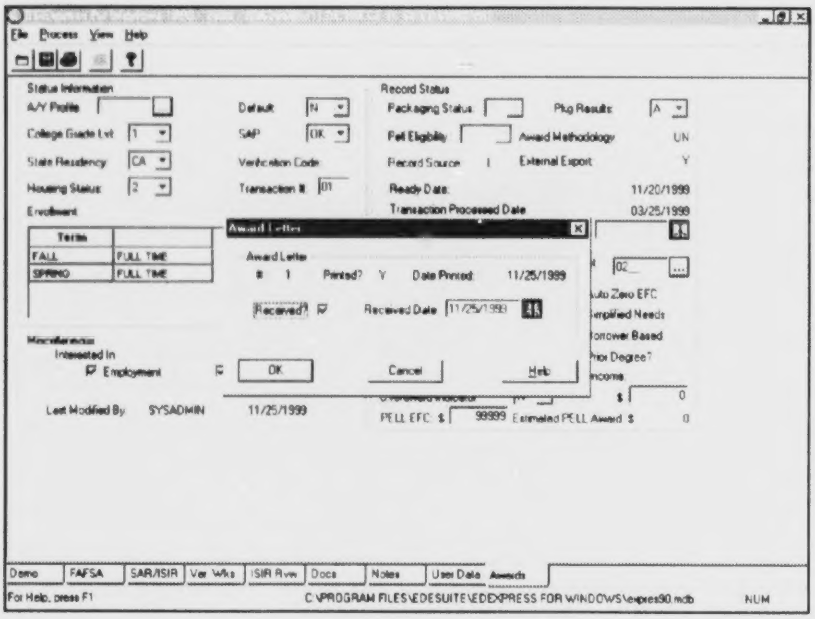
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

We begin with this record open at the Awards tab

*Click the **Award Letter** button*

We can see that an award letter has been printed for this student. Now we must indicate that the award letter has been received from the student by clicking the ***Received?*** *checkbox. The received date is added automatically, but you can also enter the date manually.*

Click ***OK****.*


File
Process
View
Help
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

Status Information
A/Y Profile
College Grade Lvl: 1
State Residency: CA
Housing Status: 2
Default: N
SAP: OK
Verification Code
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Record Status
Packaging Status
Pkg Results: A
Pell Eligibility
Award Methodology: UN
Record Source: I
External Export: Y
Ready Date: 11/20/1999
Transaction Processed Date: 03/25/1999

Award Letter
Award Letter
1 Printed? Y Date Printed: 11/25/1999
Received? ☑ Received Date: 11/25/1999

Miscellaneous
Interested In
☑ Employment

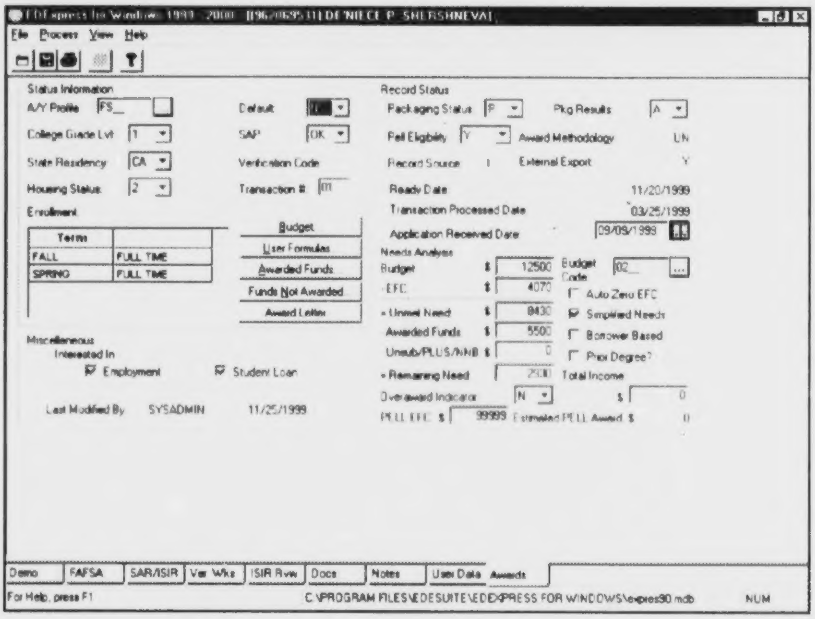
Last Modified By SYSADMIN 11/25/1999

PELL EFC $ 99999 Estimated PELL Award $ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

The student indicated on the award letter that the actual amount of the Women's Club scholarship is $1500. So we need to modify the amount of the award and repackage the student based on the new remaining need.

Click the ***Awarded Funds*** *button.*


File
Process
View
Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

EDExpress for Windows 1999 - 2000 - [962069531] DENIECE P SHERSHNEVA]

Status Information
A/Y Profile: FS
College Grade Lvl: 1
State Residency: CA
Housing Status: 2
SAP: OK
Verification Code
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Record Status
Packaging Status: P
Pkg Results: A
Pell Eligibility: Y
Award Methodology: UN
Record Source: I
External Export: Y
Ready Date: 11/20/1999
Transaction Processed Date: 03/25/1999
Application Received Date: 09/09/1999

Needs Analysis
Budget $ 12500
Budget Code: 02
-EFC $ 4070
= Unmet Need $ 8430
Awarded Funds $ 5500
Unsub/PLUS/NNB $ 0
= Remaining Need $ 2930
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Total Income $ 0
Overaward Indicator: N
PELL EFC $ 99999 Estimated PELL Award $ 0

Miscellaneous
Interested In
☑ Employment ☑ Student Loan

Last Modified By SYSADMIN 11/25/1999

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

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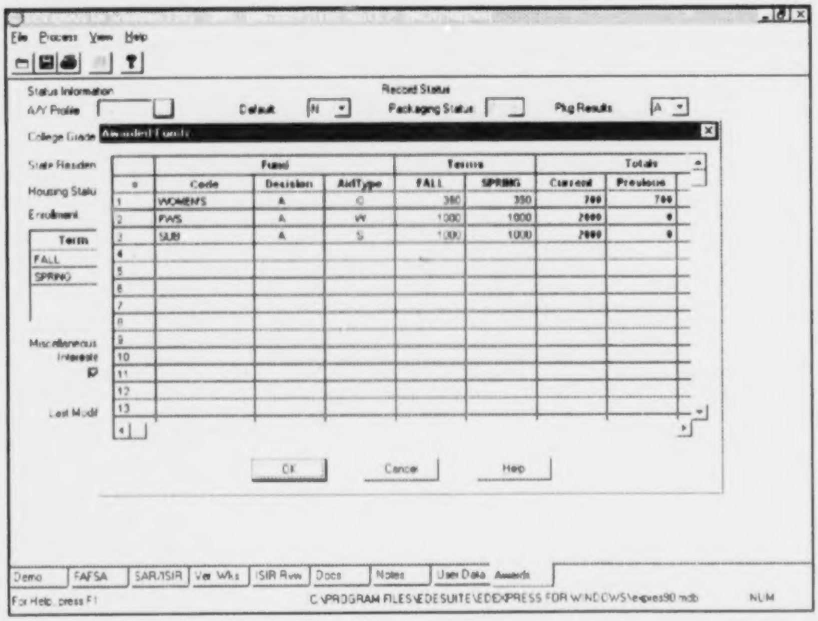

File Process View Help
Status Information
Record Status
College Grade
State Residen
Housing Statu
Enrollment
Miscellaneous Interests
Last Modif
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

A/Y Profile

Default: N

Packaging Status

Pkg Results: A

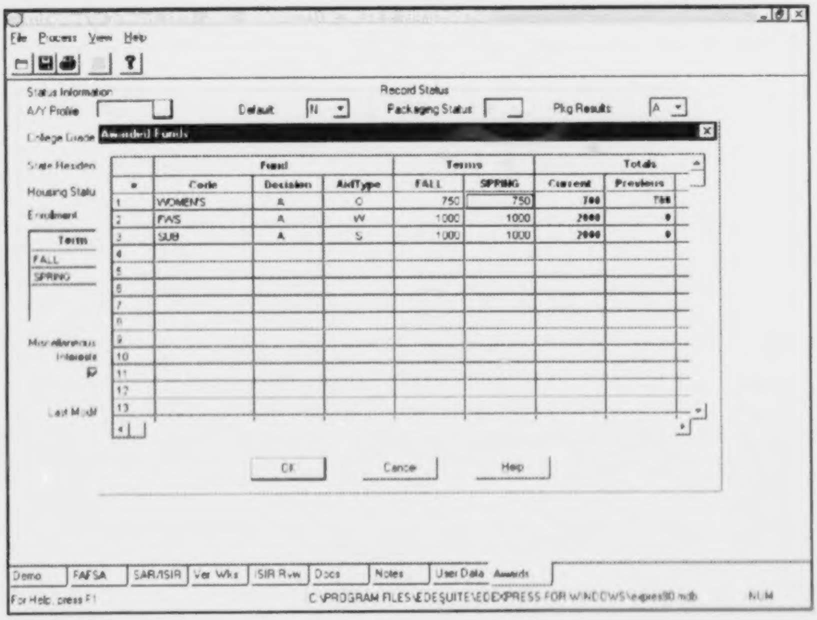
Awarded Funds

	Fund			Terms		Totals	
#	Code	Decision	AidType	FALL	SPRING	Current	Previous
1	WOMENS	A	O	350	350	700	700
2	FWS	A	W	1000	1000	2000	0
3	SUB	A	S	1000	1000	2000	0
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

Term
FALL
SPRING

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

The student was originally packaged with a scholarship of $700.


File Process View Help
Status Information
Record Status
College Grade
State Residen
Housing Statu
Enrollment
Miscellaneous Interests
Last Modif
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

A/Y Profile

Default: N

Packaging Status

Pkg Results: A

Awarded Funds

	Fund			Terms		Totals	
#	Code	Decision	AidType	FALL	SPRING	Current	Previous
1	WOMENS	A	O	750	750	700	700
2	FWS	A	W	1000	1000	2000	0
3	SUB	A	S	1000	1000	2000	0
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

Term
FALL
SPRING

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Type the new amounts for each term.

Click ***OK****.*

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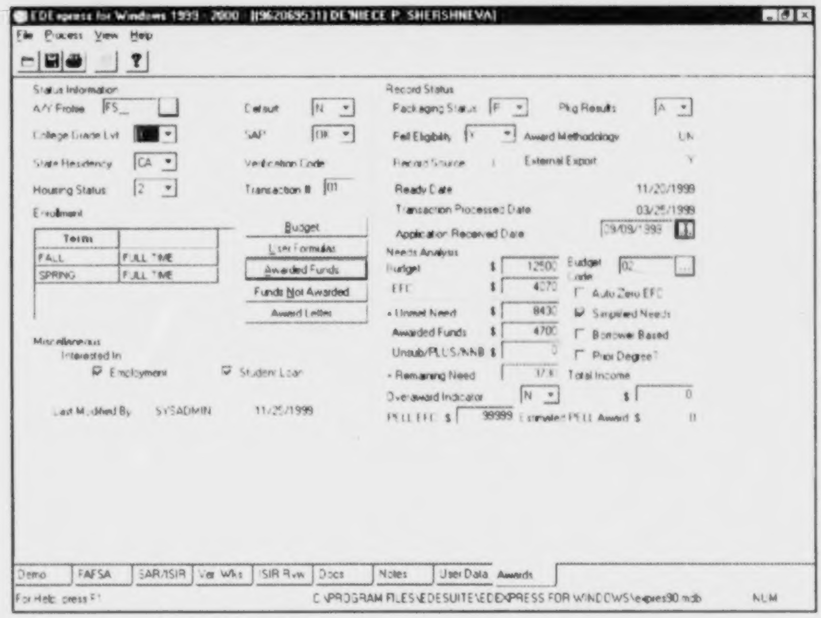
Notice the total awarded fund has changed

Click ***OK*** *to continue*



EDExpress for Windows 1999 - 2000 - [(962069531) DE'NIECE P. SHERSHNEVA]

File
Process
View
Help

Status Information

A/Y Profile: FS_

College Grade Lvl:

State Residency: CA

Housing Status: 2

Default: N

SAP: OK

Verification Code:

Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter

Miscellaneous

Interested In

☑ Employment ☑ Student Loan

Last Modified By SYSADMIN 11/25/1999

Record Status

Packaging Status: P

Pkg Results: A

Pell Eligibility: Y

Award Methodology: UN

Record Source: I

External Export: Y

Ready Date: 11/20/1999

Transaction Processed Date: 03/25/1999

Application Received Date: 09/09/1999

Needs Analysis

Budget $ 12500

Budget Code: 02

EFC $ 4070

☐ Auto Zero EFC

= Unmet Need $ 8430

☑ Simplified Needs

Awarded Funds $ 4700

☐ Borrower Based

Unsub/PLUS/NNB $ 0

☐ Prior Degree?

= Remaining Need 3730

Total Income $ 0

Overaward Indicator: N

PELL EFC $ 99999

Estimated PELL Award $ 0

Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

For Help, press F1

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NUM

Tip:

Individual awarded funds may be adjusted after a record has been packaged.

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Repackaging a Student

The repackaging process essentially packages the student again and includes any changes that have been made to the record or setup parameters. Repackage can only be used for records with a packaging status of P.

Prior to Running the Repackage Process

The fields that you may update include:

- Any of the demographic fields
- Awarded funds with an aid type of O
- User data

You may also have made changes to setup parameters, such as:

- Available Funds—Increases in beginning balance or adjustment to balance
- Fund Restrictions—New criteria
- Award Methodolgy—Funds included, award ranges, or criteria (only if no student has been packaged with this methodology)

If you need to change the student's budget, EFC, or other financial data, you must use the Unpackage process. During a Repackage process, funds with an aid type of O (Outside Aid) or funds not included in any methodologies remain. All others are changed.

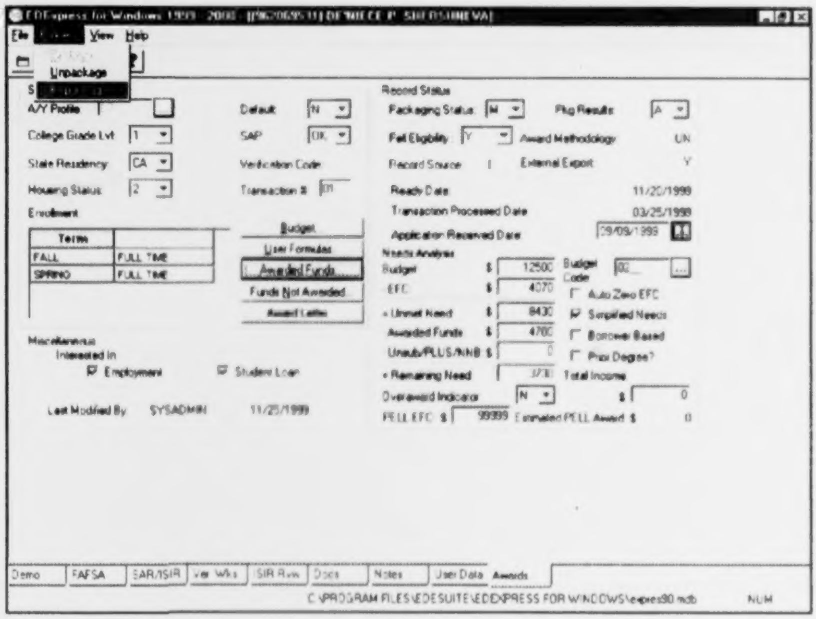
What Happens During the Repackaging Process

When you select Repackage, the software completes the following steps:

- Unpackage Pell Grant Award
- Unpackage Institution Funds
- Adjust Flags
- Redetermine Pell Grant Eligibility
- Recalculate Pell Grant Award Amount
- Redetermine Award Methodology
- Recalculate Need for Additional Aid
- Reallocate Aid
- Reset Revised Packaged Amounts
- Readjust Fund Balances
- Reset Flags

You can repackage a student by selecting ***Process/Repackage*** *from the main menu.*

Click ***Yes****.*



File
View
Help
Unpackage
Budget
User Formulas
Awarded Funds...
Funds Not Awarded
Award Letter
Demo
FAFSA
EAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

A/Y Profile
College Grade Lvl 1
State Residency CA
Housing Status 2
Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

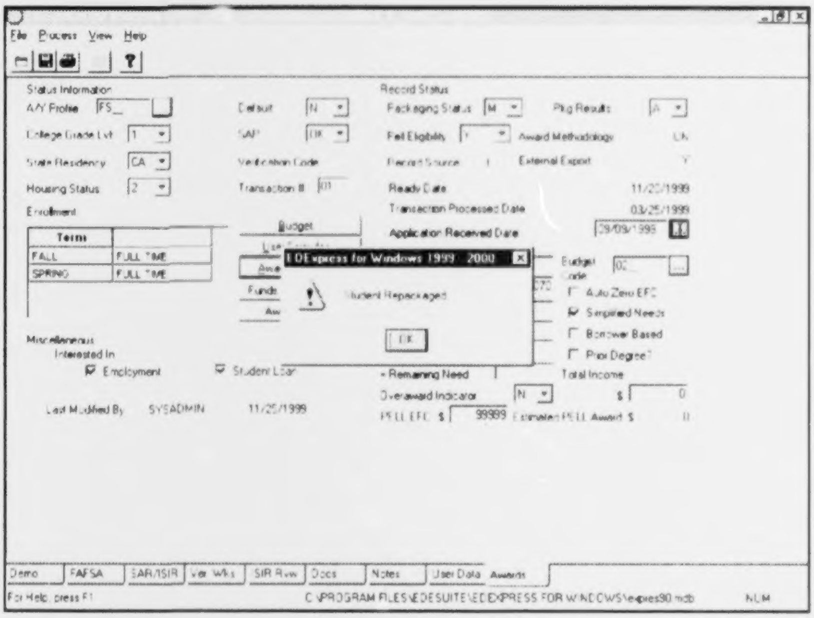
Miscellaneous
Interested In
☑ Employment ☑ Student Loan
Last Modified By SYSADMIN 11/25/1999

Default N
SAP OK
Verification Code
Transaction # 01

Record Status
Packaging Status M
Pkg Results A
Pell Eligibility Y
Award Methodology UN
Record Source I
External Export Y
Ready Date 11/20/1998
Transaction Processed Date 03/25/1998
Application Received Date 09/09/1999
Needs Analysis
Budget $ 12500
Budget Code 02
-EFC $ 4070
☐ Auto Zero EFC
= Unmet Need $ 8430
☑ Simplified Needs
Awarded Funds $ 4700
☐ Borrower Based
Unsub/PLUS/NNB $ 0
☐ Prior Degree?
= Remaining Need 3730
Total Income $ 0
Overaward Indicator N
PELL EFC $ 99999 Estimated PELL Award $ 0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

Click ***OK*** *to continue.*



File
Process
View
Help
Budget
Demo
FAFSA
EAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

EDExpress for Windows 1999 - 2000

Student Repackaged

OK

Status Information
A/Y Profile FS
College Grade Lvl 1
State Residency CA
Housing Status 2
Enrollment

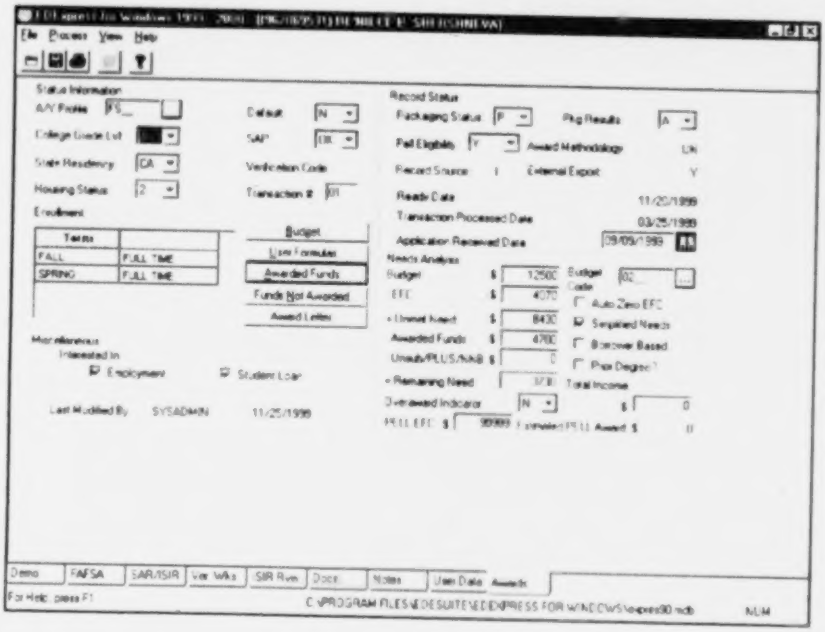
Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☑ Student Loan
Last Modified By SYSADMIN 11/25/1999

Default N
SAP OK
Verification Code
Transaction # 01

Record Status
Packaging Status M
Pkg Results A
Pell Eligibility Y
Award Methodology UN
Record Source I
External Export Y
Ready Date 11/20/1998
Transaction Processed Date 03/25/1998
Application Received Date 09/09/1999
Budget Code 02
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
= Remaining Need
Total Income $ 0
Overaward Indicator N
PELL EFC $ 99999 Estimated PELL Award $ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM


EDExpress for Windows 1999 - 2000
File Process View Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo FAFSA SAR/ISIR Ver Wks SIR Rvw Docs Notes User Data Awards
NUM

Status Information
A/Y Profile: FS_
College Grade Lvl:
State Residency: CA
Housing Status: 2
Default: N
SAP: OK
Verification Code
Transaction #: 01

Enrollment

Terms	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment
☑ Student Loan

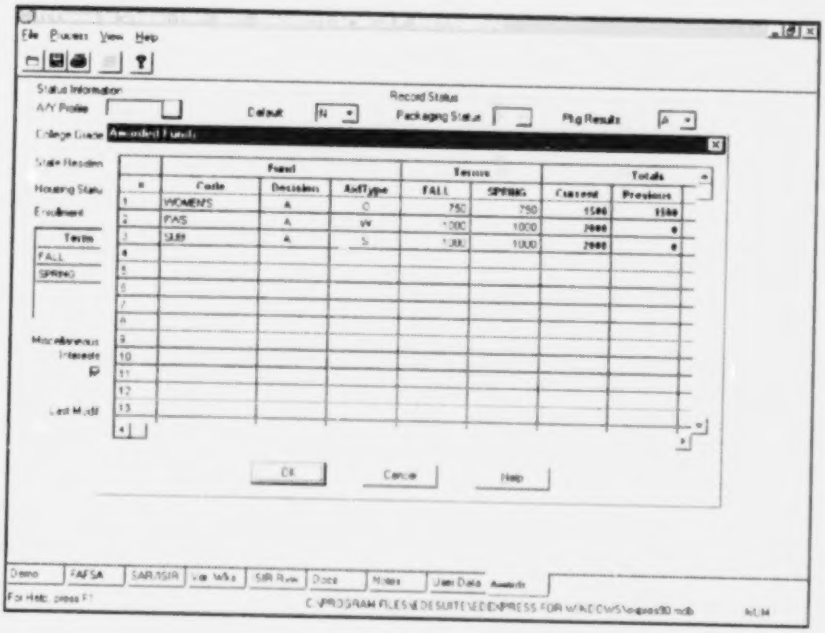
Last Modified By SYSADMIN 11/25/1999

Record Status
Packaging Status: P
Pkg Results: A
Pell Eligible: Y
Award Methodology: UN
Record Source: I
External Export: Y
Ready Date: 11/20/1999
Transaction Processed Date: 03/25/1999
Application Received Date: 09/09/1999

Needs Analysis
Budget $ 12500
Budget Code: 02
EFC $ 4070
= Unmet Need $ 8430
Awarded Funds $ 4700
Unsub/PLUS/NNB $ 0
= Remaining Need 3730
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Total Income $ 0
Overaward Indicator: N
PELL EFC $ 99999
Estimated PELL Award $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Click **Awarded Funds** to view any changes to the fund amounts awarded


File Process View Help
Awarded Funds
OK
Cancel
Help
Demo FAFSA SAR/ISIR Ver Wks SIR Rvw Docs Notes User Data Awards
NUM

Status Information
A/Y Profile:
Default: N
Record Status
Packaging Status:
Pkg Results: A

	Fund			Terms		Totals	
#	Code	Decision	Aid Type	FALL	SPRING	Current	Previous
1	WOMEN'S	A	O	750	750	1500	1500
2	FWS	A	W	1000	1000	2000	0
3	SUB	A	S	1000	1000	2000	0
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

For Help, press F1
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In this example, increasing the scholarship to $1500 did not impact the allocation of the other funds.

Click **OK** to close

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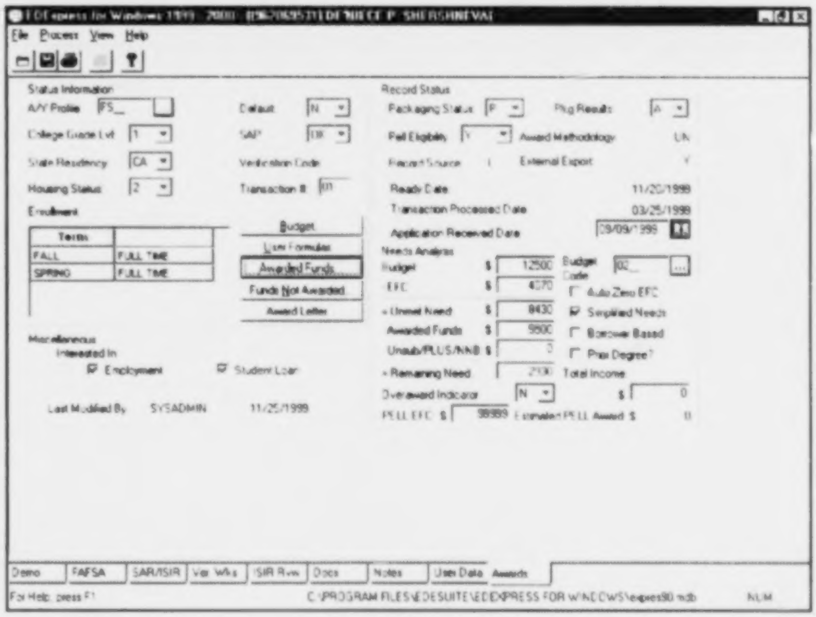
This is the complete repackaged record



EDExpress for Windows 1999 - 2000

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Awarded Funds...
Funds Not Awarded
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Demo
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Docs
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User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Status Information

A/Y Profile: FS__

College Grade Lvl: 1

State Residency: CA

Housing Status: 2

Default: N

SAP: 00

Verification Code:

Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment ☑ Student Loan

Last Modified By: SYSADMIN 11/25/1999

Record Status

Packaging Status: P

Pkg Results: A

Pell Eligibility: Y

Award Methodology: UN

Record Source: I

External Export: Y

Ready Date: 11/20/1998

Transaction Processed Date: 03/25/1998

Application Received Date: 09/09/1999

Needs Analysis

Budget: $ 12500

Budget Code: 02_

EFC: $ 4070

☐ Auto Zero EFC

= Unmet Need: $ 8430

☑ Simplified Needs

Awarded Funds: $ 9500

☐ Borrower Based

Unsub/PLUS/NNB: $ 0

☐ Prior Degree?

= Remaining Need: 2130

Total Income: $ 0

Overaward Indicator: N

PELL EFC: $ 99999

Estimated PELL Award: $ 0

In the example above:

1. What award methodology was used? ______________________________

____

2. Did the student receive any work awards? How do you know? ______________

____

____

3. How can you easily determine why a fund in an award methodology was not awarded?

____

____

____

____

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Unpackage

The Unpackage process undoes the Package process on an individual record or a group of records.

You might want to use this feature for several reasons. Perhaps you've discovered that a student has additional expenses that must be included in the budget which would cause a change in the student's need. Instead of making the necessary awarded fund changes to the student's record manually, you can unpackage the record and then let EDExpress package according to the updated information.

Use the Unpackage feature if you:

- Inadvertently package the wrong student or group of students.
- Are trying to determine how funds will be distributed across your student population. In this instance, you may package and unpackage several times to find the right combination of award methodology configurations.

How Does the Unpackage Process Work?

EDExpress performs three basic steps during the Unpackage process.

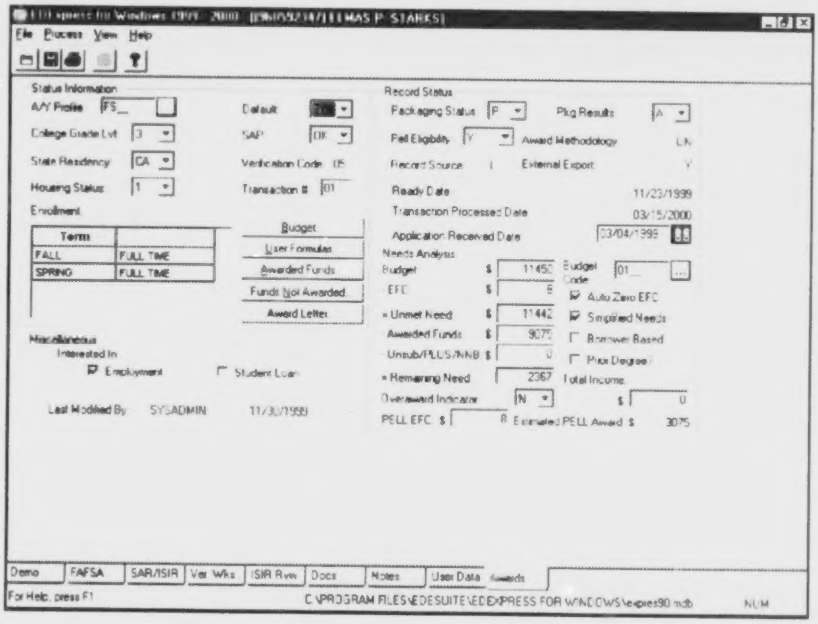
1. Unpackages Pell
2. Unpackages Awarded Funds
    - Deletes fund amount from each student record
    - Adds the amount back to the corresponding fund current balance
3. Adjusts Flags
    - Resets Packaging status flag from P to U
    - Deletes Packaging Results flag
    - Deletes decision flags (A/D) for each fund awarded
    - Deletes the code of the award methodology used (Code)
    - Assigns the User ID of the person taking the unpackaging action to the student's record (User Modified)
    - Assigns the current date to the record (Date Modified)

9

Award Letters & Adjustments

In this example, the student notified you that he will be enrolled in a program that included a winter term. Now we must change his Academic Year Profile.

This record is already open to the Awards tab.


EDExpress for Windows 1999 - 2000 - [[960592347]ELMAS P STARKS]
File
Process
View
Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
NUM

Status Information
A/Y Profile FS_
College Grade Lvl 3
State Residency CA
Housing Status 1
Default
SAP OK
Verification Code 05
Transaction # 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

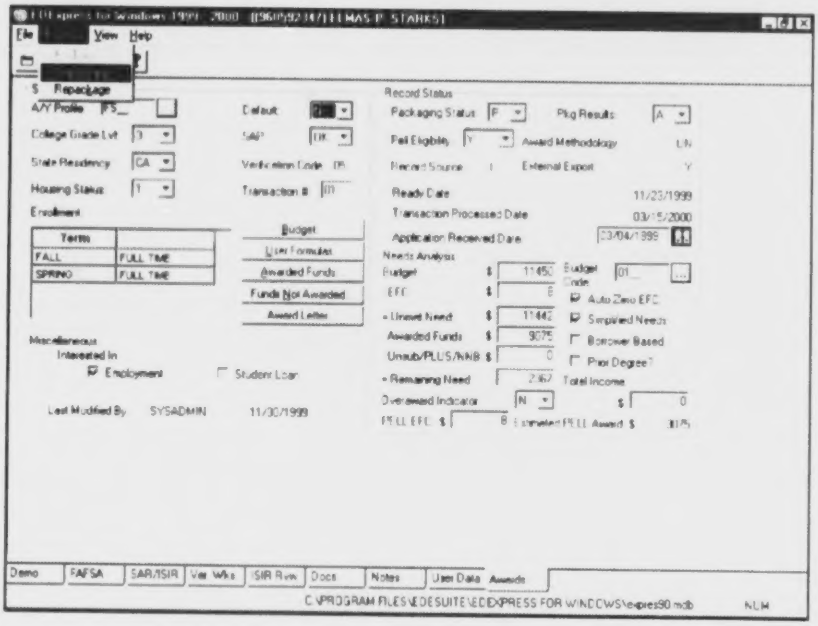
Miscellaneous
Interested In
☑ Employment
☐ Student Loan
Last Modified By SYSADMIN 11/30/1999

Record Status
Packaging Status P
Pkg Results A
Pell Eligibility Y
Award Methodology UN
Record Source I
External Export Y
Ready Date 11/23/1999
Transaction Processed Date 03/15/2000
Application Received Date 03/04/1999

Needs Analysis
Budget $ 11450
Budget Code 01
- EFC $ 8
☑ Auto Zero EFC
= Unmet Need $ 11442
☑ Simplified Needs
- Awarded Funds $ 9075
☐ Borrower Based
- Unsub/PLUS/NNB $ 0
☐ Prior Degree?
= Remaining Need 2367
Total Income $ 0
Overaward Indicator N
PELL EFC $ 8
Estimated PELL Award $ 3075

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Select ***Process, Unpackage*** *from the menu.*


EDExpress for Windows 1999 - 2000 - [[960592347]ELMAS P STARKS]
File
Process
View
Help
Unpackage
Repackage
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
NUM

A/Y Profile FS_
College Grade Lvl 3
State Residency CA
Housing Status 1
Default
SAP OK
Verification Code 05
Transaction # 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment
☐ Student Loan
Last Modified By SYSADMIN 11/30/1999

Record Status
Packaging Status P
Pkg Results A
Pell Eligibility Y
Award Methodology UN
Record Source I
External Export Y
Ready Date 11/23/1999
Transaction Processed Date 03/15/2000
Application Received Date 03/04/1999

Needs Analysis
Budget $ 11450
Budget Code 01
EFC $ 8
☑ Auto Zero EFC
= Unmet Need $ 11442
☑ Simplified Needs
Awarded Funds $ 9075
☐ Borrower Based
Unsub/PLUS/NNB $ 0
☐ Prior Degree?
= Remaining Need 2367
Total Income $ 0
Overaward Indicator N
PELL EFC $ 8
Estimated PELL Award $ 3075

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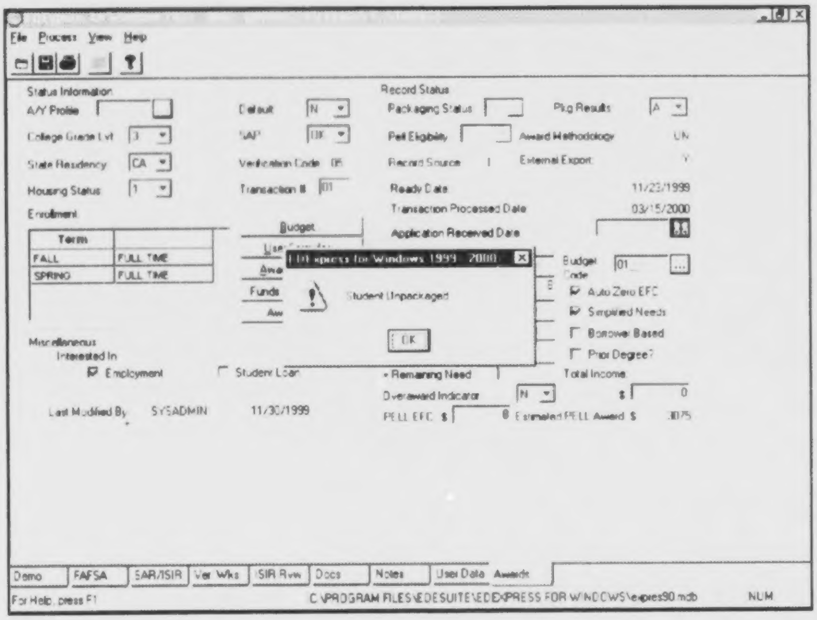
File
Process
View
Help
Budget
Funds
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

EDExpress for Windows 1999 - 2000

Student Unpackaged

OK

Status Information

A/Y Profile

College Grade Lvl 3

State Residency CA

Housing Status 1

Default N

SAP OK

Verification Code 05

Transaction # 01

Record Status

Packaging Status

Pkg Results A

Pell Eligibility

Award Methodology UN

Record Source I

External Export Y

Ready Date 11/23/1999

Transaction Processed Date 03/15/2000

Application Received Date

Budget Code 01

☑ Auto Zero EFC

☑ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

= Remaining Need

Total Income $ 0

Overaward Indicator N

PELL EFC $ 8

Estimated PELL Award $ 3075

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment ☐ Student Loan

Last Modified By SYSADMIN 11/30/1999

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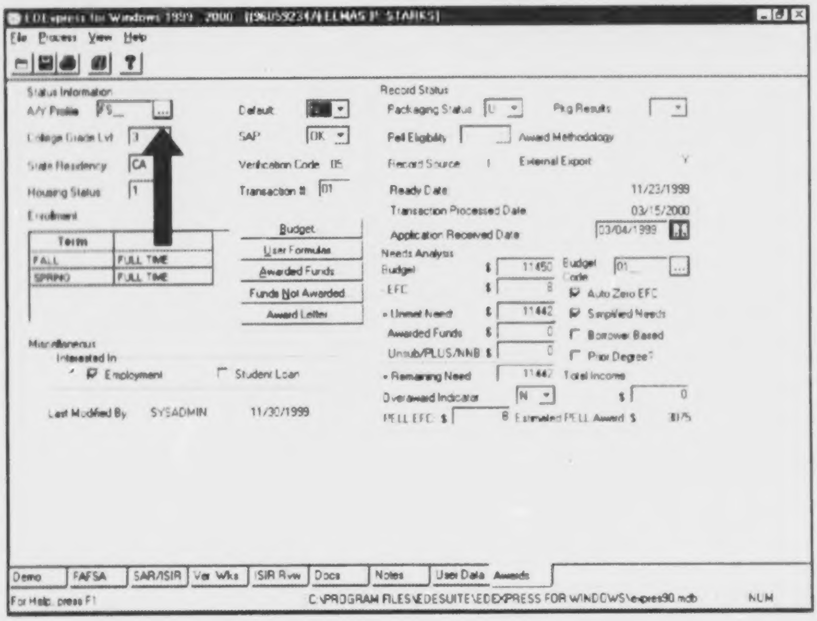
*Click **OK** to continue.*

Tip:

If you package, print an award letter, and unpackage, you will have no history of the original award other than the letter.


File
Process
View
Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

EDExpress for Windows 1999 - 2000 - [196059234/ELMAS P STARKS]

Status Information

A/Y Profile FS_

College Grade Lvl 3

State Residency CA

Housing Status 1

Default

SAP OK

Verification Code 05

Transaction # 01

Record Status

Packaging Status U

Pkg Results

Pell Eligibility

Award Methodology

Record Source I

External Export Y

Ready Date 11/23/1999

Transaction Processed Date 03/15/2000

Application Received Date 03/04/1999

Needs Analysis

Budget $ 11450

Budget Code 01

- EFC $ 8

☑ Auto Zero EFC

= Unmet Need $ 11442

☑ Simplified Needs

Awarded Funds $ 0

☐ Borrower Based

Unsub/PLUS/NNB $ 0

☐ Prior Degree?

= Remaining Need 11442

Total Income $ 0

Overaward Indicator N

PELL EFC $ 8

Estimated PELL Award $ 3075

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment ☐ Student Loan

Last Modified By SYSADMIN 11/30/1999

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Note the adjustments to the awarded funds and need amounts.

Click the ellipsis button next to the A/Y Profile field.

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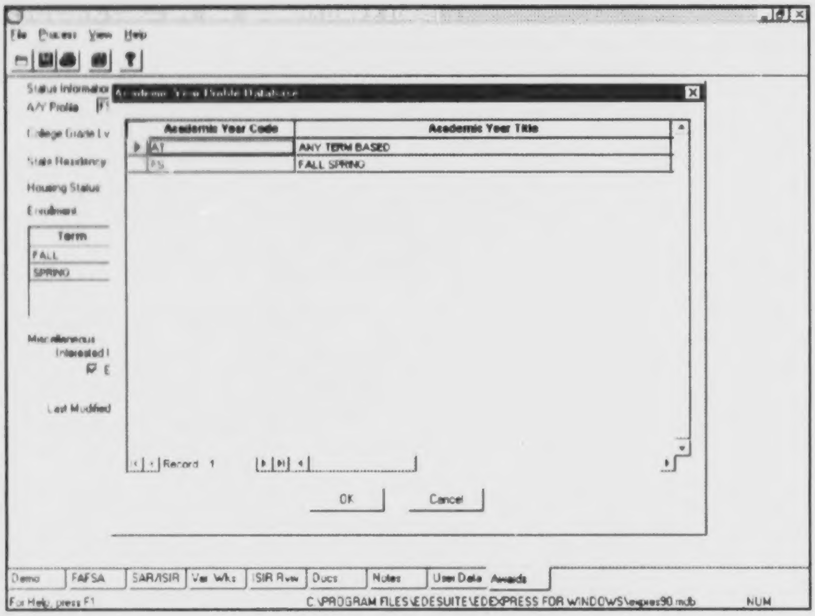
The original budget applied was the standard budget.



Academic Year Profile Database

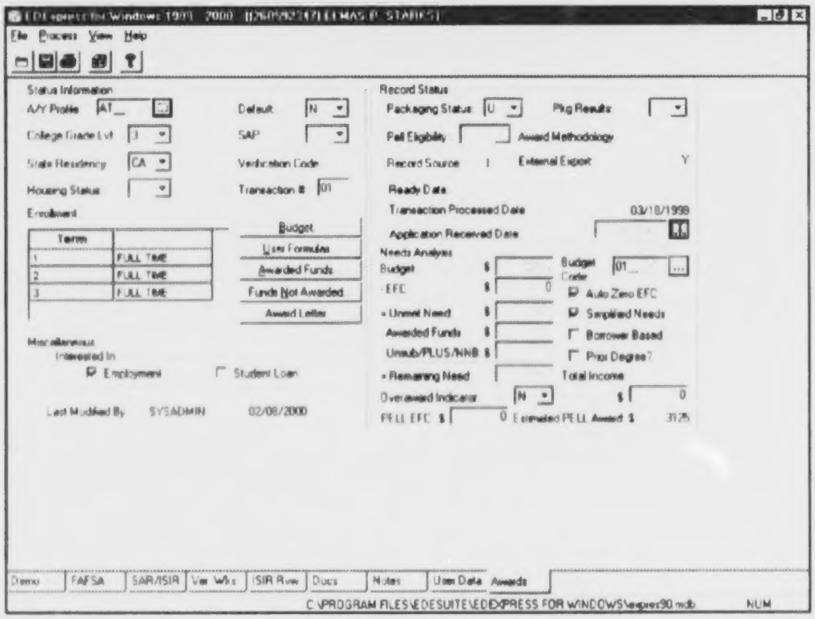
Academic Year Code	Academic Year Title
AT	ANY TERM BASED
FS	FALL SPRING

Record 1

File Process View Help
Status Information
A/Y Profile
College Grade Lv
State Residency
Housing Status
Enrollment
Term
FALL
SPRING
Miscellaneous
Interested I
Last Modified
OK
Cancel
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

To update, go to the first available line and type a component title and amount.

*Click **OK** to close*



EDExpress for Windows 1999 - 2000

Status Information

A/Y Profile: AT

College Grade Lvl: 3

State Residency: CA

Housing Status:

Default: N

SAP:

Verification Code

Transaction #: 01

Enrollment

Term	
1	FULL TIME
2	FULL TIME
3	FULL TIME

Miscellaneous

Interested In

☑ Employment ☐ Student Loan

Last Modified By SYSADMIN 02/08/2000

Record Status

Packaging Status: U

Pkg Results:

Pell Eligibility:

Award Methodology

Record Source: I

External Export: Y

Ready Date

Transaction Processed Date: 03/18/1999

Application Received Date:

Needs Analysis

Budget $

- EFC $ 0

= Unmet Need $

Awarded Funds $

Unsub/PLUS/NNB $

= Remaining Need

Budget Code: 01

☑ Auto Zero EFC

☑ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

Total Income $ 0

Overaward Indicator: N

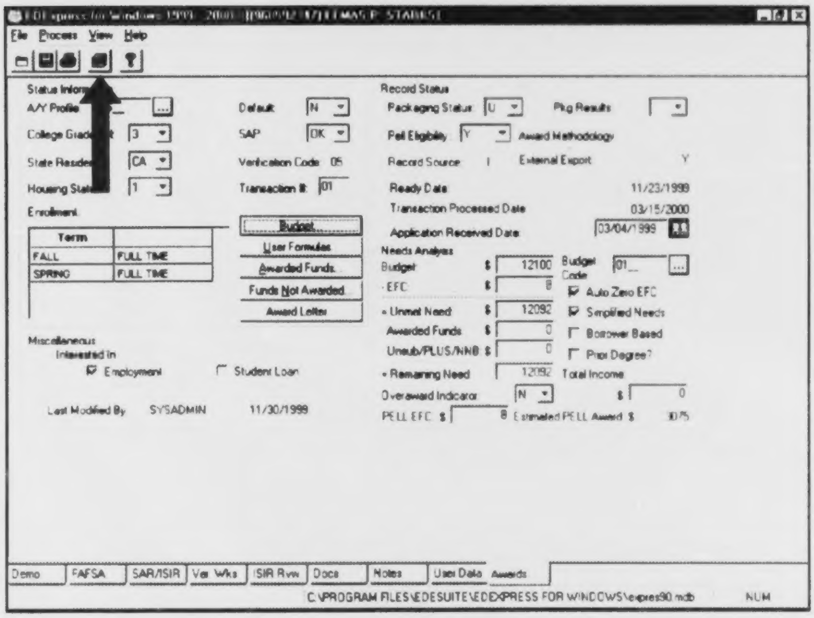
PELL EFC $ 0

Estimated PELL Award $ 3125

File Process View Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Now you're ready to package the student again.

Click the **Package** *icon on the toolbar.*


File
Process
View
Help
Budget...
User Formulas
Awarded Funds...
Funds Not Awarded...
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

Status Information

College Grade Lvl: 3

State Residency: CA

Housing Status: 1

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment ☐ Student Loan

Last Modified By SYSADMIN 11/30/1999

Default: N

SAP: OK

Verification Code: 05

Transaction #: 01

Record Status

Packaging Status: U

Pkg Results:

Pell Eligibility: Y

Award Methodology

Record Source: I

External Export: Y

Ready Date: 11/23/1999

Transaction Processed Date: 03/15/2000

Application Received Date: 03/04/1999

Needs Analysis

Budget $ 12100

Budget Code: 01

- EFC $ 8

☑ Auto Zero EFC

= Unmet Need $ 12092

☑ Simplified Needs

Awarded Funds $ 0

☐ Borrower Based

Unsub/PLUS/NNB $ 0

☐ Prior Degree?

= Remaining Need 12092

Total Income $ 0

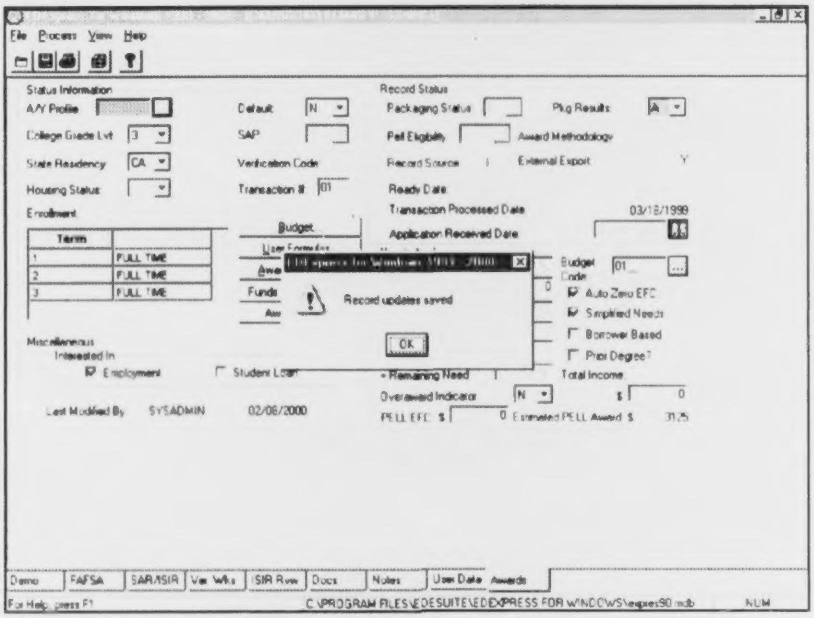
Overaward Indicator: N

PELL EFC $ 8

Estimated PELL Award $ 3075

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

Click **OK** *to continue.*


File
Process
View
Help
Budget...
User Formulas
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
OK

Status Information

A/Y Profile

College Grade Lvl: 3

State Residency: CA

Housing Status:

Enrollment

Term	
1	FULL TIME
2	FULL TIME
3	FULL TIME

Miscellaneous

Interested In

☑ Employment ☐ Student Loan

Last Modified By SYSADMIN 02/08/2000

Default: N

SAP:

Verification Code

Transaction #: 01

Record Status

Packaging Status:

Pkg Results: A

Pell Eligibility:

Award Methodology

Record Source: I

External Export: Y

Ready Date

Transaction Processed Date: 03/18/1999

Application Received Date:

Budget Code: 01

☑ Auto Zero EFC

☑ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

= Remaining Need

Total Income $ 0

Overaward Indicator: N

PELL EFC $ 0

Estimated PELL Award $ 3125

Record updates saved

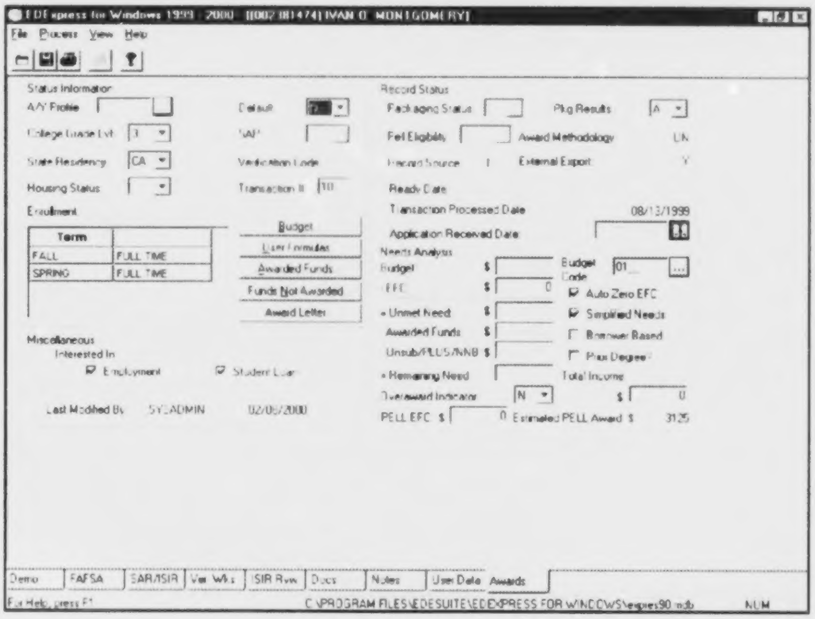
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

Manual Adjustments

In this example, we will record an award letter as received and an unsubsidized loan as declined.

*Click the **Award Letter** button.*



EDExpress for Windows 1999 - 2000 - [(002381474) IVAN O MONTGOMERY]

Status Information
A/Y Profile:
College Grade Lvl: 3
State Residency: CA
Housing Status:
Default:
SAP:
Verification Code:
Transaction #: 10

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In: ☑ Employment ☑ Student Loan
Last Modified By: SYSADMIN 02/08/2000

Record Status
Packaging Status:
Pkg Results: A
Pell Eligibility:
Award Methodology: UN
Record Source: I
External Export: Y
Ready Date:
Transaction Processed Date: 08/13/1999
Application Received Date:

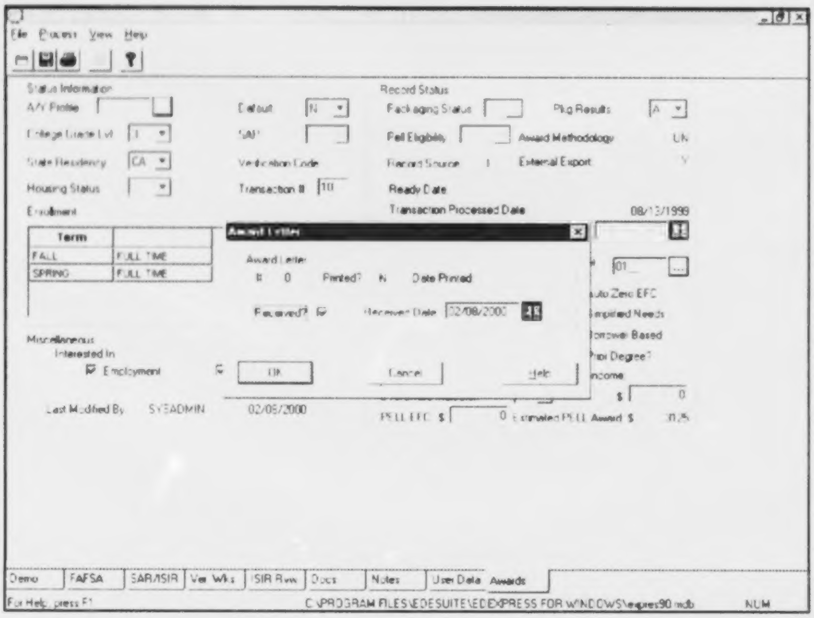
Needs Analysis
Budget $
Budget Code: 01
EFC $ 0
☑ Auto Zero EFC
= Unmet Need $
☑ Simplified Needs
Awarded Funds $
☐ Borrower Based
Unsub/PLUS/NNB $
☐ Prior Degree?
= Remaining Need
Total Income $ 0
Overaward Indicator: N
PELL EFC $ 0
Estimated PELL Award $ 3125

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

File
Process
View
Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

*Since we received an award letter from the student, check the **Received?** box.*

*Click **OK**.*

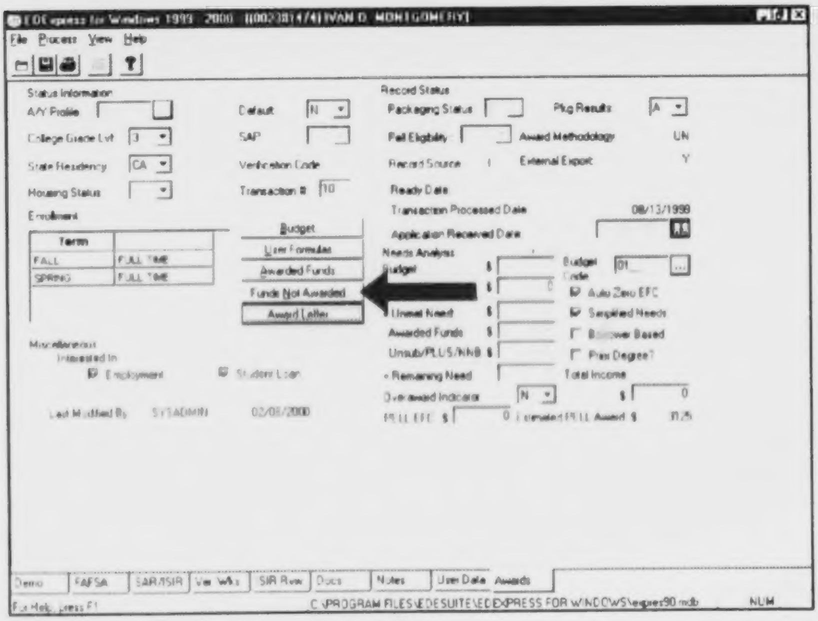


Award Letter

Award Letter
#: 0 Printed?: N Date Printed:
Received?: ☑ Received Date: 02/08/2000

OK
Cancel
Help

BEST COPY AVAILABLE


EDExpress for Windows 1999 - 2000 - [002381474] IVAN D MONTGOMERY]
File Process View Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

Status Information

A/Y Profile

College Grade Lvl: 3

State Residency: CA

Housing Status

Default: N

SAP

Verification Code

Transaction #: 10

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☑ Student Loan

Last Modified By: SYSADMIN 02/08/2000

Record Status

Packaging Status

Pkg Results: A

Pell Eligibility

Award Methodology: UN

Record Source: I

External Export: Y

Ready Date

Transaction Processed Date: 08/13/1999

Application Received Date

Needs Analysis

Budget $

$ 0

Budget Code: 01

☑ Auto Zero EFC

Unmet Need $

☑ Simplified Needs

Awarded Funds $

☐ Borrower Based

Unsub/PLUS/NNB $

☐ Prev Degree?

= Remaining Need

Total Income $ 0

Over-award Indicator: N

PELL EFC $ 0

Estimated PELL Award $ 3125

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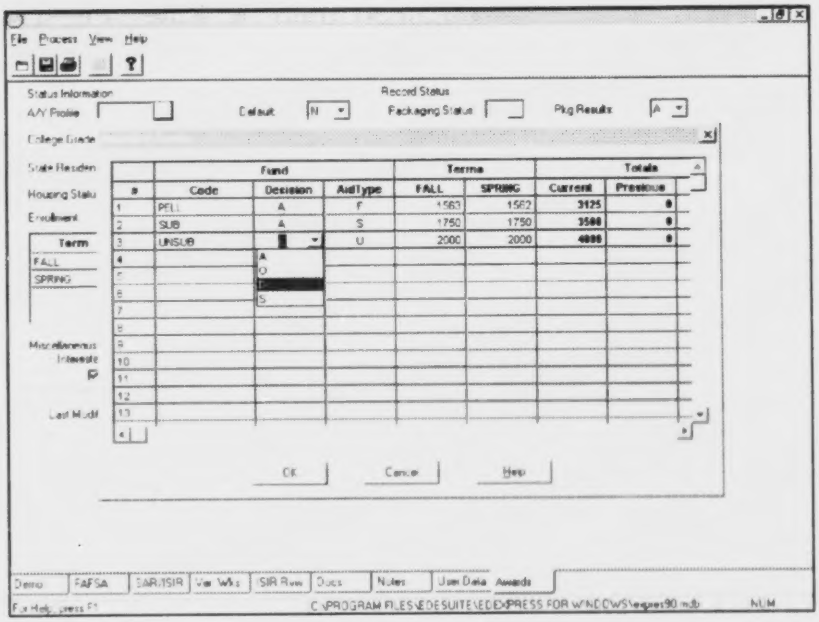
Next, click the **Awarded Funds** button to view the individual funds.


File Process View Help
Status Information
A/Y Profile
College Grade
State Residen
Housing Statu
Enrollment
Term
FALL
SPRING
Miscellaneous
Interests
Last Modif
A
O
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S
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

Default: N

Record Status

Packaging Status

Pkg Results: A

	Fund			Terms		Totals	
#	Code	Decision	AidType	FALL	SPRING	Current	Previous
1	PELL	A	F	1563	1562	**3125**	**0**
2	SUB	A	S	1750	1750	**3500**	**0**
3	UNSUB		U	2000	2000	**4000**	**0**
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

The student indicated that he did not want an unsubsidized loan.

Click on the ***Decision*** *field for the UNSUB fund code.*

Select the ***D*** *value for decline.*

Click ***OK***

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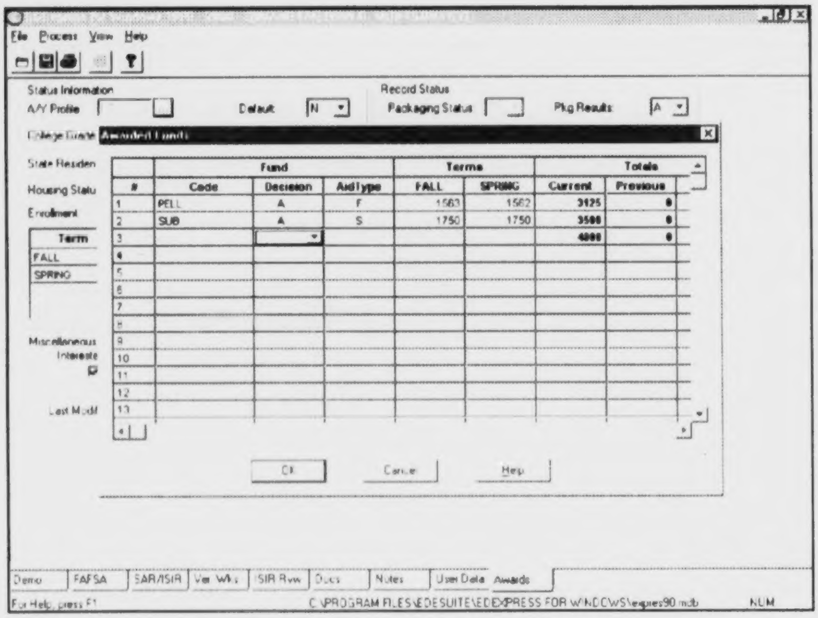
Click **OK** to remove the loan from the awarded funds grid.


File Process View Help
College Grade
State Residen
Housing Statu
Miscellaneous Interests
Last Modif
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Status Information
A/Y Profile
Default N
Record Status
Packaging Status
Pkg Results A

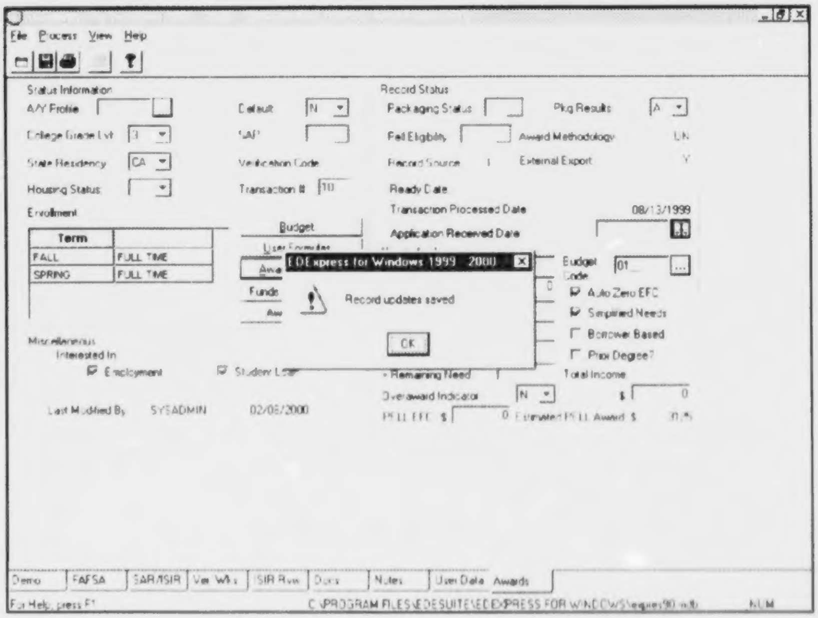
Enrollment

Term
FALL
SPRING

Awarded Funds

	Fund			Terms		Totals	
#	Code	Decision	AidType	FALL	SPRING	Current	Previous
1	PELL	A	F	1563	1562	3125	0
2	SUB	A	S	1750	1750	3500	0
3						4000	0
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

Click **OK**.


File Process View Help
Budget
User Formulas
Awa
Funds
Aw
OK
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Status Information
A/Y Profile
Default N
College Grade Lvl 3
SAP
State Residency CA
Verification Code
Housing Status
Transaction # 10
Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

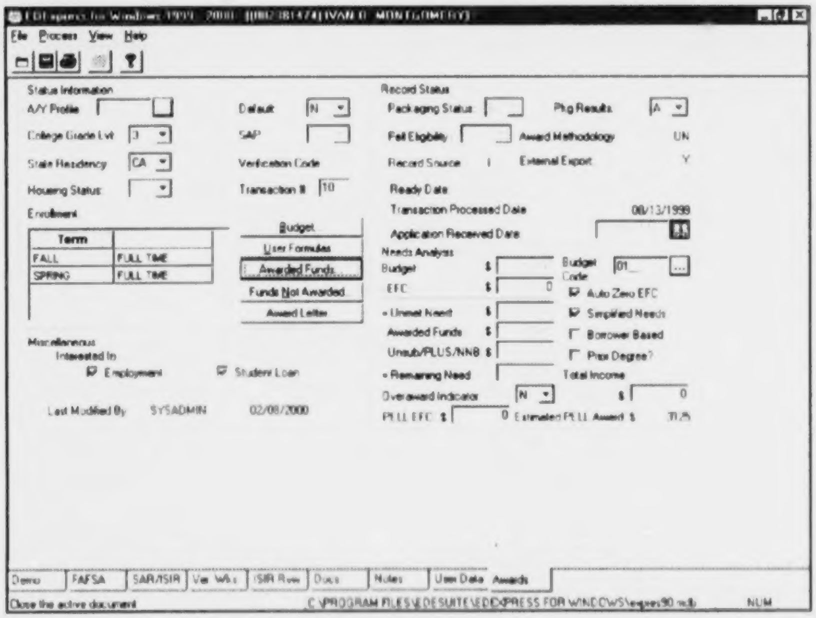
Miscellaneous
Interested In
☑ Employment ☑ Student Loan

Last Modified By SYSADMIN 02/05/2000

Record Status
Packaging Status
Pkg Results A
Pell Eligibility
Award Methodology UN
Record Source I
External Export Y
Ready Date
Transaction Processed Date 08/13/1999
Application Received Date
Budget Code 01
☑ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Remaining Need
Total Income $ 0
Overaward Indicator N
PELL EFC $ 0
Estimated PELL Award $

EDExpress for Windows 1999 - 2000

Record updates saved


File Process View Help
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

EDExpress for Windows 1999 - 2000 - [0082381474] IVAN D MONTGOMERY]

Status Information
A/Y Profile
College Grade Lvl 3
State Residency CA
Housing Status
Default N
SAP
Verification Code
Transaction # 10

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☑ Student Loan

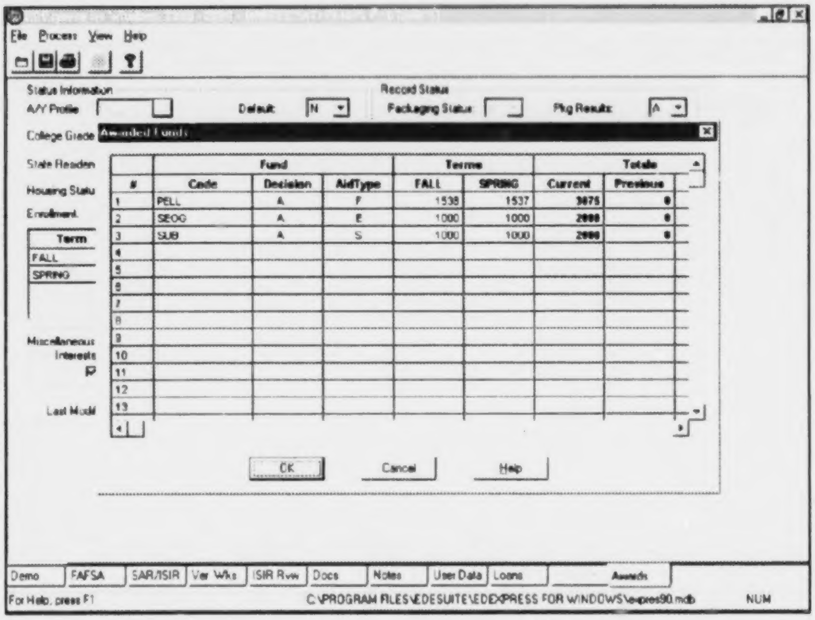
Last Modified By SYSADMIN 02/08/2000

Record Status
Packaging Status
Pkg Results A
Pell Eligibility
Award Methodology UN
Record Source I
External Export Y
Ready Date
Transaction Processed Date 08/13/1999
Application Received Date

Needs Analysis
Budget $
Budget Code 01
EFC $ 0
☑ Auto Zero EFC
= Unmet Need $
☑ Simplified Needs
Awarded Funds $
☐ Borrower Based
Unsub/PLUS/NNB $
☐ Prior Degree?
= Remaining Need
Total Income $ 0
Overaward Indicator N
PELL EFC $ 0
Estimated PELL Award $ 3125

Close the active document
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

*Since the student declined **$4,000** in an unsubsidized loan, the remaining need has changed from **$1,525** to **$5,525**.*


File Process View Help
Awarded Funds
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards

Status Information
A/Y Profile
Default N
Record Status
Packaging Status
Pkg Results A

	Fund			Terms		Totals	
#	Code	Decision	AidType	FALL	SPRING	Current	Previous
1	PELL	A	F	1538	1537	3075	0
2	SEOG	A	E	1000	1000	2000	0
3	SUB	A	S	1000	1000	2000	0
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

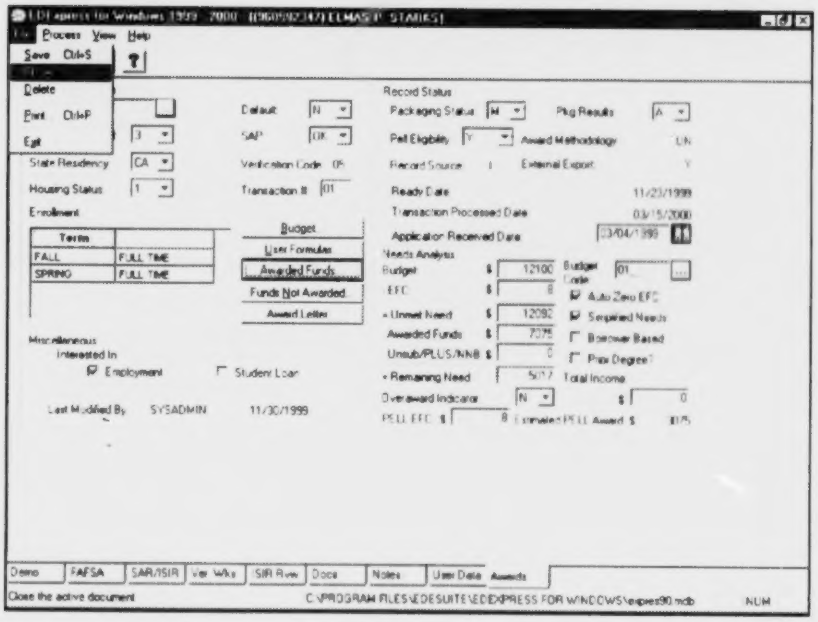
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

The declined FWS fund is no longer listed on the student's award.

*Click **OK** to close.*

All updates have been made and you're ready to close this record.

Click the ***File/Close*** *on the menu bar.*



EDExpress for Windows 1999 - 2000 - [illegible]
File Process View Help
Save Ctrl+S
Close
Delete
Print Ctrl+P
Exit
Budget
User Formulas
Awarded Funds
Funds Not Awarded
Award Letter
Demo
FAFSA
SAR/ISIR
Ver Wks
SIR Rvw
Docs
Notes
User Data
Awards

State Residency: CA
Housing Status: 1
Default: N
SAP: OK
Verification Code: 05
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☐ Student Loan

Last Modified By SYSADMIN 11/30/1999

Record Status
Packaging Status: M
Pkg Results: A
Pell Eligibility: Y
Award Methodology: UN
Record Source: I
External Export: Y
Ready Date: 11/23/1999
Transaction Processed Date: 03/15/2000
Application Received Date: 03/04/1999

Needs Analysis
Budget $ 12100
Budget Code: 01
- EFC $ 8
☑ Auto Zero EFC
= Unmet Need $ 12092
☑ Simplified Needs
- Awarded Funds $ 7075
☐ Borrower Based
- Unsub/PLUS/NNB $ 0
☐ Prior Degree?
= Remaining Need 5017
Total Income $ 0
Overaward Indicator: N
PELL EFC $ 8
Estimated PELL Award $ [illegible]

Close the active document
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

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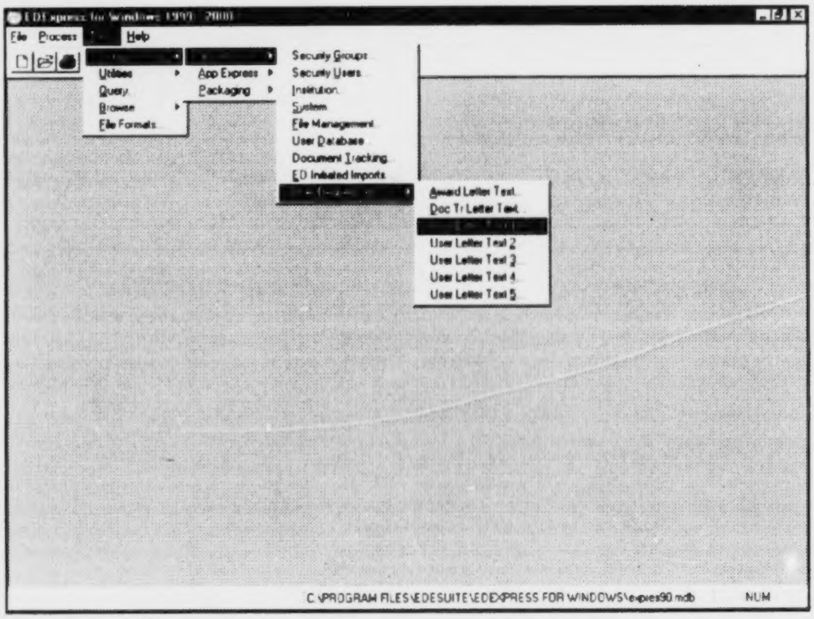
Creating User Letter Text

You can define text for up to five user letters for any purpose. For example, you may want to send a letter to all students awarded a loan, reminding them to sign and return a promissory note.


EDExpress for Windows 1999 - 2000
File
Process
Help
Utilities
Query
Browse
File Formats
App Express
Packaging
Security Groups
Security Users
Institution
System
File Management
User Database
Document Tracking
ED Initiated Imports
Award Letter Text
Doc Tr Letter Text
User Letter Text 2
User Letter Text 3
User Letter Text 4
User Letter Text 5
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Select ***Tools/Setup/Global/User Defined Text/User Letter Text*** *from the menu bar.*

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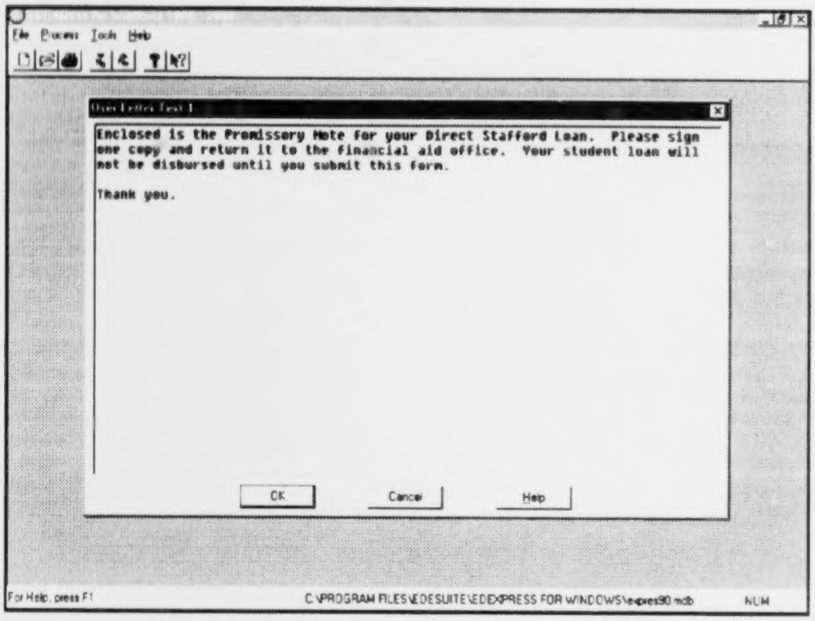
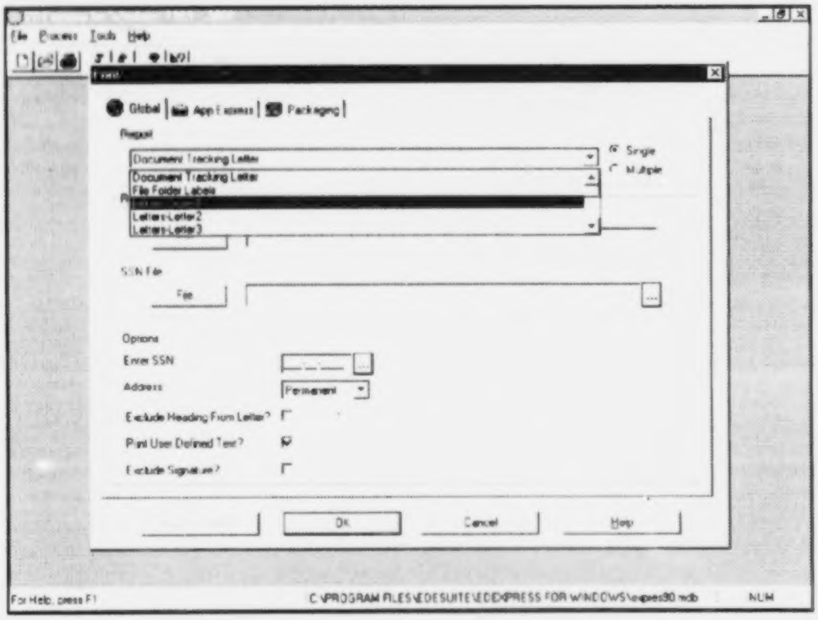
*Enter the free-form text and click **OK**.*


File Process Tools Help
User Letter Text 1
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

```
Enclosed is the Promissory Note for your Direct Stafford Loan.  Please sign
one copy and return it to the financial aid office.  Your student loan will
not be disbursed until you submit this form.

Thank you.
```

Printing a User Letter



Report: Document Tracking Letter ● Single ○ Multiple

Document Tracking Letter
File Folder Labels
Letters-Letter1
Letters-Letter2
Letters-Letter3

SSN File

Options

Enter SSN

Address: Permanent

Exclude Heading From Letter? ☐

Print User Defined Text? ☑

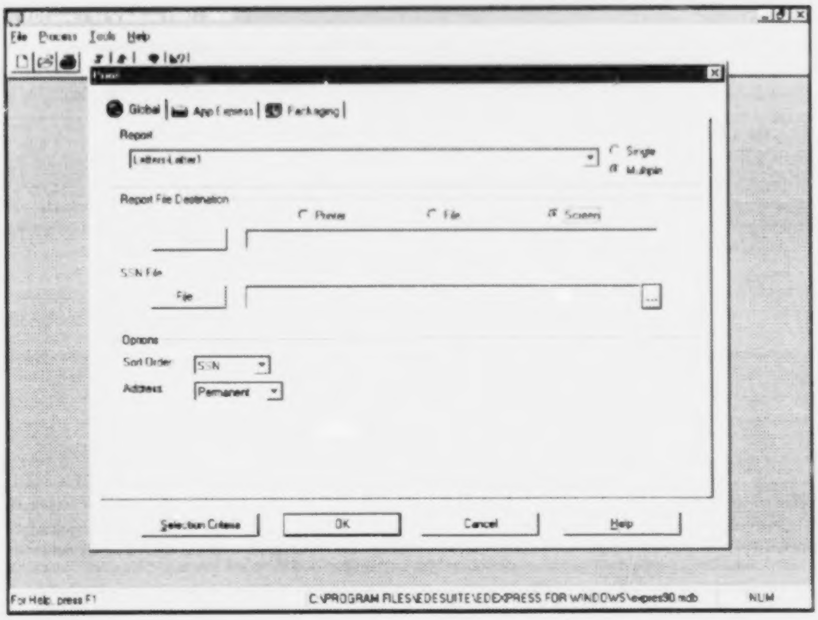
Exclude Signature? ☐

File Process Tools Help
Print
Global
App Express
Packaging
File
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

To print a letter using the text you created, select **File/Print** from the menu bar.

Click the **Global** tab.

Click the down arrow in the Report field to select **Letters - Letter 1**.



Report: Letters-Letter1 ○ Single ● Multiple

Report File Destination: ○ Printer ○ File ● Screen

SSN File

Options

Sort Order: SSN

Address: Permanent

File Process Tools Help
Print
Global
App Express
Packaging
File
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Click **Multiple**.

Select **Screen** as your report file destination.

Click **Selection Criteria** to identify the group to print.

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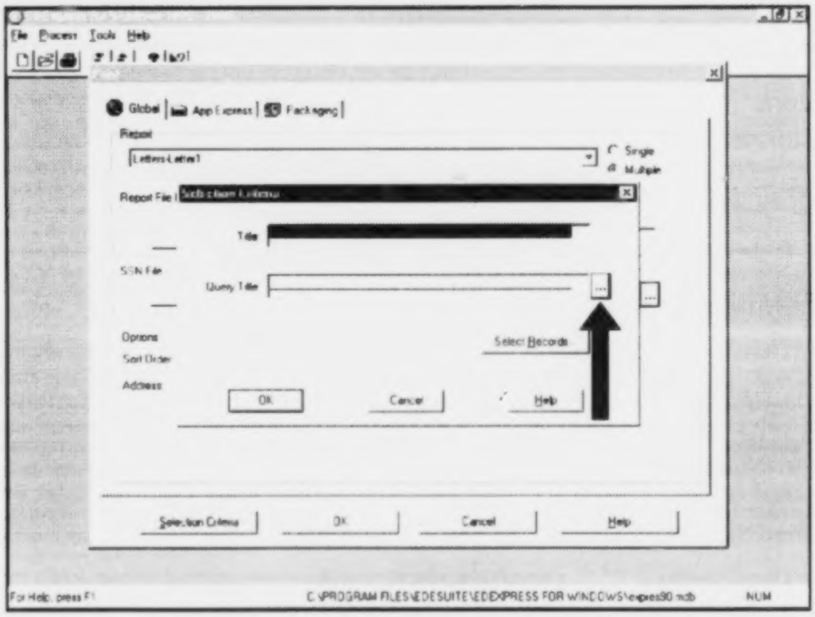
*Click the **ellipsis** button for user-defined criteria.*



Report: Letters-Letter1

○ Single ● Multiple

Selection Criteria

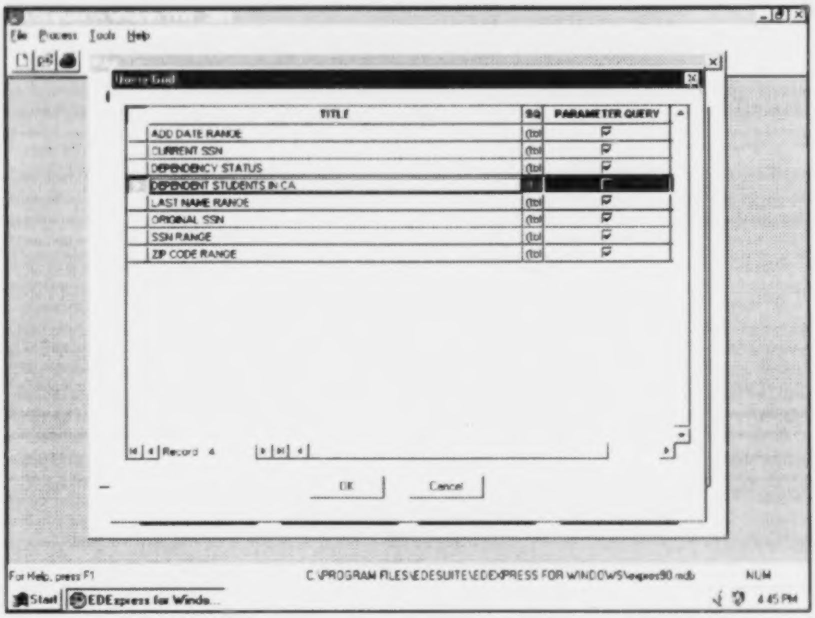
Title [redacted]

Query Title

File Process Tools Help
Global
App Express
Packaging
Report File
SSN File
Options
Sort Order
Address
Select Records
OK
Cancel
Help
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Since we want to send this letter to dependent students in California only, we select the query that identifies Stafford recipients with a fund accept status.

*Click **OK**.*

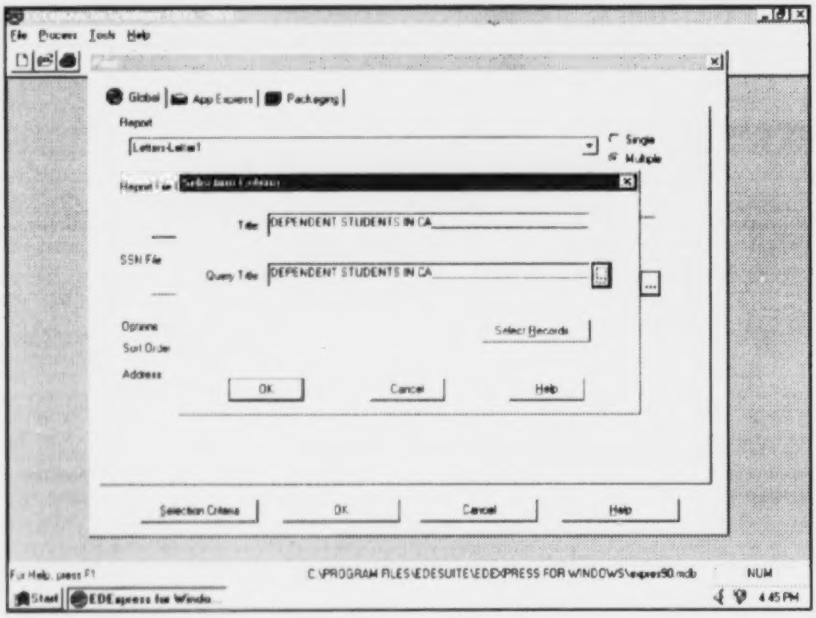


Query Grid

TITLE	SQ	PARAMETER QUERY
ADD DATE RANGE	(tbl	☑
CURRENT SSN	(tbl	☑
DEPENDENCY STATUS	(tbl	☑
DEPENDENT STUDENTS IN CA	[illegible]	☐
LAST NAME RANGE	(tbl	☑
ORIGINAL SSN	(tbl	☑
SSN RANGE	(tbl	☑
ZIP CODE RANGE	(tbl	☑

Record: 4

File Process Tools Help
OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM
Start
EDExpress for Windo...
4:45 PM


File Process Tools Help
Global
App Express
Packaging
Selection Criteria
Select Records
OK
Cancel
Help
Selection Criteria
OK
Cancel
Help
SSN File
Options
Sort Order
Address
Start
EDExpress for Windo...
4:45 PM

Report: Letters-Letter1

○ Single
● Multiple

Title: DEPENDENT STUDENTS IN CA

Query Title: DEPENDENT STUDENTS IN CA

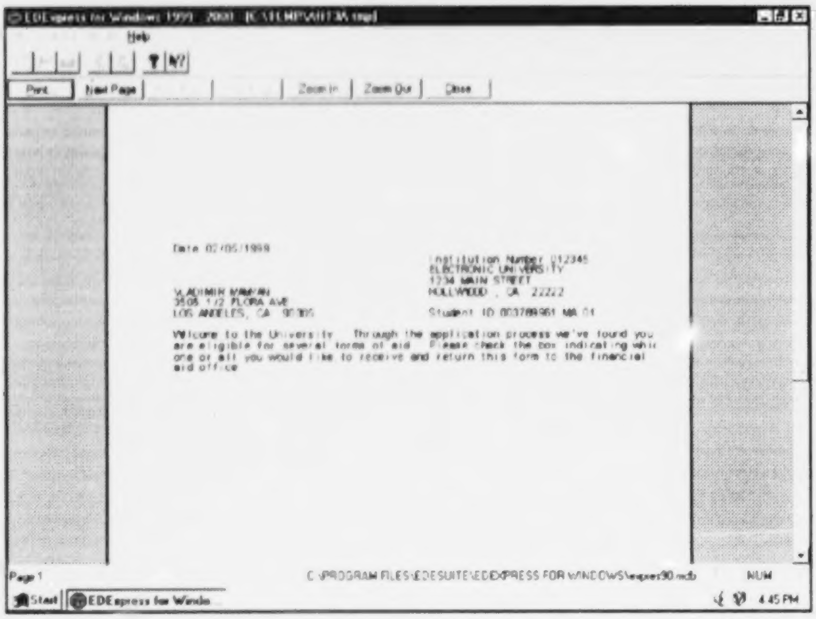
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

We want to make a further selection from the records that meet the selection criteria.

*Click **Yes** for Choose Selected Records?*

*Click **OK** to continue*


Help
Print
Next Page
Zoom In
Zoom Out
Close
Start
EDExpress for Windo...
4:45 PM

Date 02/05/1999

Institution Number 012345
ELECTRONIC UNIVERSITY
1234 MAIN STREET
HOLLYWOOD , CA 22222

VLADIMIR [illegible]
3505 1/2 FLORA AVE
LOS ANGELES, CA [illegible]

Student ID [illegible]

Welcome to the University. Through the application process we've found you are eligible for several forms of aid. Please check the box indicating whic one or all you would like to receive and return this form to the financial aid office

Page 1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

The letter is displayed

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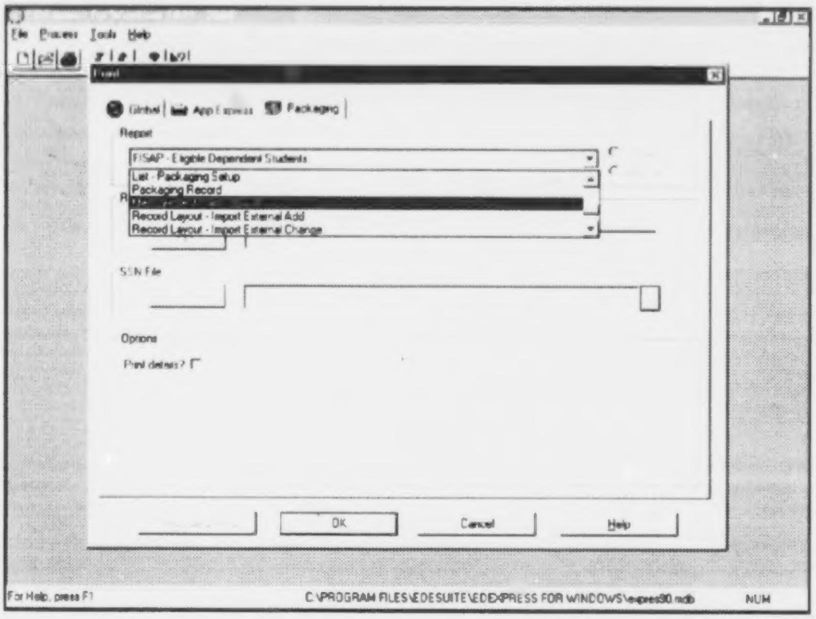
Measurement Tools - Funds

This report provides a summary and analysis of the funds awarded. You can print it at any time to see the totals of funds awarded by aid type and the total number of students awarded each aid type.

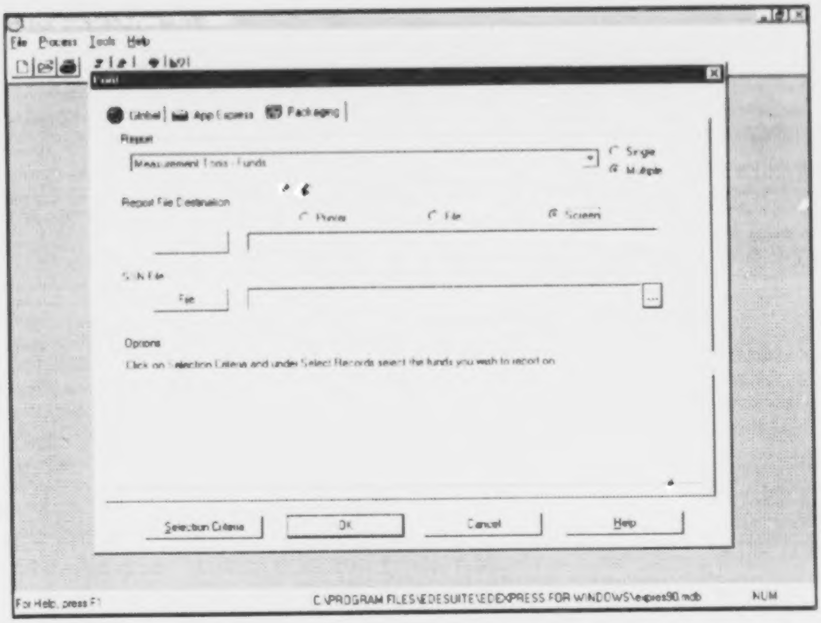
*Select **File/Print** from the main menu.*

*Click the **Global** tab.*

*Select the report type **Measurement Tools-Funds**.*


File
Process
Tools
Help
Print
Global
App Express
Packaging
Report
FISAP - Eligible Dependent Students
List - Packaging Setup
Packaging Record
Record Layout - Import External Add
Record Layout - Import External Change
SSN File
Options
Print detail? ☐
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb
NUM

BEST COPY AVAILABLE


File Process Tools Help
Fund
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
File
For Help, press F1
NUM

Report: Measurement Tools - Funds

○ Single
● Multiple

Report File Destination: ○ Printer ○ File ● Screen

SSN File

Options

Click on Selection Criteria and under Select Records select the funds you wish to report on.

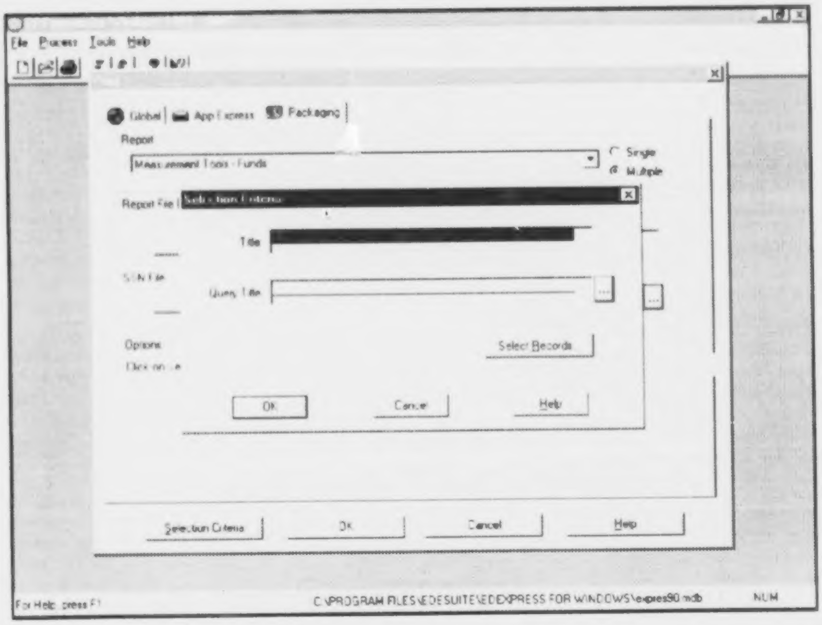
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Select a report destination.

Select Multiple to include more than one fund.

The Options box directs you to use selection criteria.

Click the **Selection Criteria** button.


File Process Tools Help
Global
App Express
Packaging
Selection Criteria
Title
Query Title
Select Records
OK
Cancel
Help
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Report: Measurement Tools - Funds

○ Single
● Multiple

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Click the **Select Records** button.

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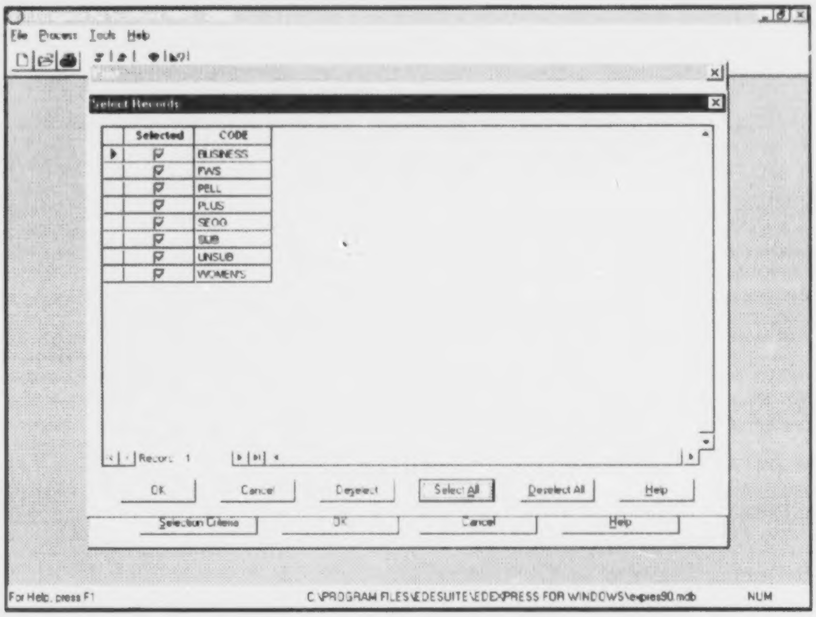
Click the check boxes of the funds you want to include.

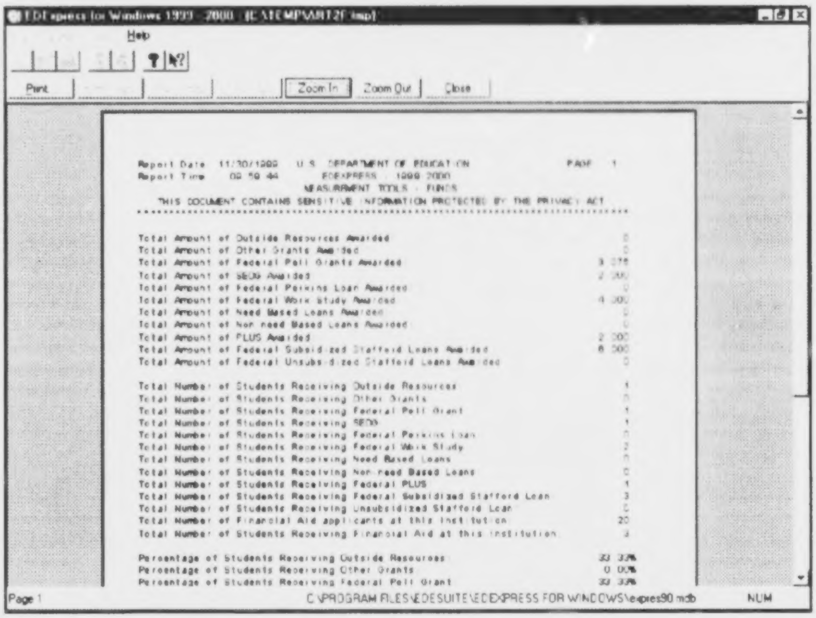
In this case, we want to see a report for all of the funds. Click **OK** when complete.



	Selected	CODE
▶	☑	BUSINESS
	☑	FWS
	☑	PELL
	☑	PLUS
	☑	SEOG
	☑	SUB
	☑	UNSUB
	☑	WOMEN'S

Select Records
File Process Tools Help
Record: 1
OK
Cancel
Deselect
Select All
Deselect All
Help
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

The report lists dollar amounts for each aid type and the number of students awarded each type.



```
Report Date  11/30/1999   U.S. DEPARTMENT OF EDUCATION              PAGE  1
Report Time   09:59:44        EDEXPRESS  1999-2000
                          MEASUREMENT TOOLS - FUNDS
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****************************************************************************

Total Amount of Outside Resources Awarded                                   0
Total Amount of Other Grants Awarded                                        0
Total Amount of Federal Pell Grants Awarded                             3 078
Total Amount of SEOG Awarded                                            2 000
Total Amount of Federal Perkins Loan Awarded                                0
Total Amount of Federal Work Study Awarded                              4 000
Total Amount of Need Based Loans Awarded                                    0
Total Amount of Non need Based Loans Awarded                                0
Total Amount of PLUS Awarded                                            2 000
Total Amount of Federal Subsidized Stafford Loans Awarded               6 500
Total Amount of Federal Unsubsidized Stafford Loans Awarded                 0

Total Number of Students Receiving Outside Resources                        1
Total Number of Students Receiving Other Grants                             0
Total Number of Students Receiving Federal Pell Grant                       1
Total Number of Students Receiving SEOG                                     1
Total Number of Students Receiving Federal Perkins Loan                      0
Total Number of Students Receiving Federal Work Study                       2
Total Number of Students Receiving Need Based Loans                         0
Total Number of Students Receiving Non need Based Loans                     0
Total Number of Students Receiving Federal PLUS                             1
Total Number of Students Receiving Federal Subsidized Stafford Loan         3
Total Number of Students Receiving Unsubsidized Stafford Loan               0
Total Number of Financial Aid applicants at this institution               20
Total Number of Students Receiving Financial Aid at this institution        3

Percentage of Students Receiving Outside Resources                     33.33%
Percentage of Students Receiving Other Grants                           0.00%
Percentage of Students Receiving Federal Pell Grant                    33.33%
```

EDExpress for Windows 1999 - 2000
Help
Print
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Apply What You Know

In the following exercises, you will set up and print letters, unpackage, repackage, and modify flags for two packaging records.

Set up Award Letter Text

1. From the main menu, select **Tools/Setup/Global/User Defined Text/Award Letter Text**.
2. Type the text in the free-form area.
3. Click **OK** when finished.

Set up User Letter Text

1. From the main menu, select **Tools/Setup/Global/User Defined Text/User Letter Text**.
2. Type the text in the free-form area.
3. Click **OK** when finished.

Print an Award Letter

1. From the main menu select **File/Print**.
2. Click the **Packaging** tab.
3. Click the down arrow in the Report field to locate **Letters - Award**.
4. Click **Single**.
5. Send the report to the printer.
6. Type an SSN.
7. Type an Acceptance Date.
8. Click to exclude Headings and Signature Block.
9. Click to print User Defined text.
10. Click **OK**.

Print a User Letter

1. Select **File/Print** from the main menu.
2. Click the **Global** tab.
3. Click the down arrow in the Report field to locate Letters - Letter 1.
4. Click **Single**.
5. Send the report to the printer.
6. Click **Selection Criteria** to select a group to print.
7. Click **OK**.

Create a Query

Using the worksheet on the following page, create a query to identify students who were packaged by hand or whose packages were manually adjusted and for whom an award letter was generated.

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

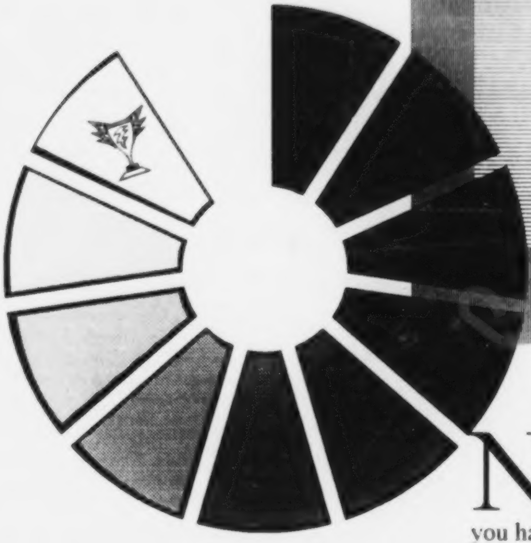
And ☐ Or ☐ Left (☐ Right) ☐

Discussion Questions for Chapter 9

1. Do you have to decline an entire package or can you decline a single award? If so, how?
2. List two uses for user defined letters.
3. If a record has been packaged, can you modify the budget?
4. Does Unpackage remove all funds from the student's record?

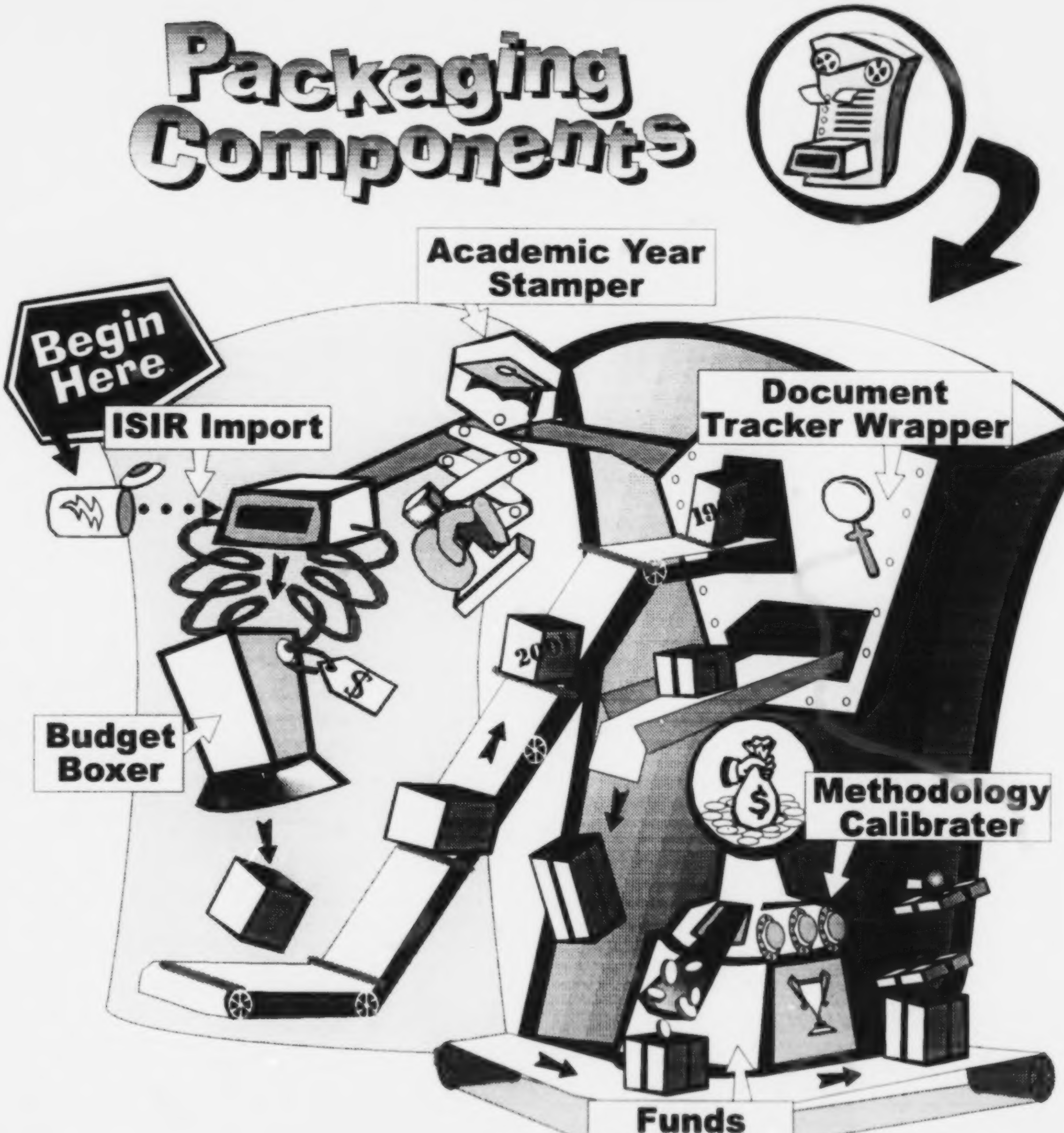
Chapter 10

Workshop



Now that you have mastered all the basic concepts in electronic packaging, you are ready to use the "live" software to package some students. For this exercise you have the option of using the suggested examples or setting up the software the way you would at your school. We have provided information for each of the three stages of electronic packaging (Setup, Import ISIR, Package the Records) in the same order as presented previously.

Packaging Components


Begin Here
ISIR Import
Academic Year Stamper
Document Tracker Wrapper
Budget Boxer
$
199
200
Methodology Calibrater
$
Funds Dispenser

Steps to Automated Packaging

You complete the packaging process in three stages:

Stage 1—Setup

Define the components and parameters of your institution and methodology which include:

Step 1. Queries
Step 2. Academic Year Profile
Step 3. Budgets
Step 4. Document Tracking
Step 5. Funds Maintenance
Step 6. Award Methodology

Stage 2—Import ISIR

A. Import ISIR records
B. Print a list of unpackaged records
C. Open a packaging record
D. Add an outside fund

Stage 3—Package the Records

A. Global Package
B. Print a list of packaged records
C. Open a packaged record
D. Fund maintenance list
E. Measurement tools fund maintenance
F. Set up Award Letter text
G. Print an Award Letter
H. Record receipt of an Award Letter
I. User-defined Letters

Your Challenge

Your challenge is to successfully create and package aid electronically to students and report critical pieces of information about the process. Complete this worksheet as you work through each step of the packaging process.

	Answer	Where did you locate answer?
Number of budgets created		
Number of students assigned to each budget		
Beginning balance of a work fund		
Total number of students receiving Pell Grants		
Number of packaging records created		
Fund that was not awarded to a student and why		
Number of students assigned to an award methodology		
Percentage of students receiving grants		
Total amounts awarded in Unsubsidized Stafford Loans		
Total amount of Subsidized Federal Stafford Loans awarded		
Number of students on probation		
Total number of defined queries		

How to Accomplish the Task

You have two options for completing this exercise.

1. **Use the provided examples.** A set of case information is provided to you for each of the functions required to electronically package a student. Use the blank worksheets included to aid in the setup process

2. **Use your own setup.** If you want to practice setting up EDExpress using your school's parameters and criteria, you will need to know some information about the student records on the system. Adapt the data to your methodology. For example, you may use the state of residency as criteria for creating budgets. Normally, your state is Florida, but none of the records in the software have Florida as the state of residency. You just need to modify the setup to accommodate the data.

Some Common Student Attributes

- State of Residency = VA, GA and MI
- Received from CPS Date = 02/02/1999
- CPS Processed Date = 01/30/1999

To determine other useful common elements, print the List-Processed ISIRs report using various selection criteria or queries.

Use the blank worksheets included to aid in the setup process

Stage 1—Step 1—Queries

Create some queries for use at your school.

Use the worksheets provided to record your query information. When you have completed the worksheets, create the queries. Refer to the software exercises used in Chapter 2 for examples. In the exercises, you will formulate queries for the following groups:

- Dependent students residing in Georgia
- Dependent students living off-campus or with parents
- Students interested in work-study
- Independent students selected for verification
- Independent undergraduate students residing in Georgia

Note:

In App Processing, create a query for dependent selected for verification.

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Stage 1—Step 2—Academic Year Profile

Create at least one Academic Year Profile for your institution. If you are using the examples supplied you have a choice as to the type Pell formula to use. You are provided four Pell formula examples below. Choose the example that best fits your institution.

School Attributes

For each Pell formula, each item provides information for the setup field in EDExpress.

Pell Formula 1

- Academic Year consists of two primary terms: Fall and Spring
- Use EFC for 9 months
- Use Pell Formula for 30 weeks
- Allocate aid equally across both terms for all types of aid
- Assign Enrollment status based on student's value supplied for Fall 99 and Spring 2000

Pell Formula 2

Academic Year consists of two primary terms: Term1 and Term 2

- Use EFC for 9 months
- Use Pell Formula for < 30 weeks
- Program is 26 weeks / 30 weeks standard = 86.67% Program Proration
- Allocate aid equally across both terms for all types of aid
- Assign Enrollment status of full-time for both terms

Pell Formula 3 or 6

Academic Year consists of three terms: Term 1, Term 2, and Term3

- Use EFC for 9 months
- Use Pell Formula for Any term based credit hour programs
  Term 1 Pell % = 15 weeks / 34 full academic year = 44.12%
  Term 2 Pell % = 4 weeks / 34 full academic year = 11.76%
  Term 3 Pell % = 15 weeks / 34 full academic year = 44.12%
- Allocate aid equally across terms for all types of aid
- Assign Enrollment status of full-time for both terms

Pell Formula 4 or 5

Terms = Disb 1 and Disb 2

- Use EFC for 9 months
- Use Pell Formula for Clock-hour and Credit hour without terms
- Program is 28 weeks / 30 weeks standard = 93.33% Program Proration
  400 clock hours / 900 standard = 44.44% Pell % for each disbursement
- Assign Enrollment status of full-time for both terms
- Allocate aid equally across both terms for all types of aid

Create the Record

1. From the Main Menu, select **Tools/Setup/Packaging/Academic Year Profile**.
2. Type a code.
3. Click the **Default** box.
4. Type a title.
5. Select the appropriate Pell Formula type.
6. Set the number of months for the EFC.
7. Create your terms.
8. Type the term name.
9. Select an enrollment status.
10. Select allocation percentage for each aid type.
11. Click **Save**.

Academic Year Profile Worksheet

Establish a code to identify this Academic Year (up to 4-character alphanumeric).		
Is this Academic Year the default Academic Year?	Yes ☐	No ☐
What is your campus title for this Academic Year? (Free-form)		

Enter Pell Formula

1. ☐	**Standard Term 30 weeks.** (Additional Pell Percentage information is not required.)
2. ☐	**Standard Term less than 30 weeks.** (Provide a Pell Percentage in Pell Proration field.)
3. ☐	**Any Term-based credit hour program.** (Provide a Pell Percentage in Pell % per term boxes.)
4. ☐	**Clock Hour and Credit Hour without terms.** (Provide a Pell Percentage in Pell Proration field.)
5. ☐	**Correspondence Study - Award based on half-time payment schedule.** (Provide a Pell Percentage in Pell Proration field.)
6. ☐	**Correspondence Study - Award based on less than half-time payment schedule.** (Provide a Pell Percentage in Pell Proration field.)

If this is a Proration Academic Year, what is the Proration Percentage? ________% (00 to 99)

What is the EFC program length in months?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☒ 10 ☐ 11 ☐ 12 ☐

Term Breakdown

Term Name (Free-form)	Default Enrollment Status (F, 3/4, 1/2, <1/2, Fall 99 Winter 99, etc.)	Pell % for term	Grant % for term	Perkins % for term	FWS % for term	Loan % for term

Stage 1—Step 3—Budgets

Create at least three budgets for your institution.

Code: 01
Title: Dependent in Georgia

Tuition and Fees	$8600
Room and Board	3000
Books and Supplies	800
Transportation	750
Miscellaneous	800

Criteria: Dependent residing in Georgia
Priority: 1

Code: 02
Title: Graduate
Priority: 2

Tuition and Fees	$10500
Room and Board	4000
Books and Supplies	950
Transportation	1500
Miscellaneous	800

Criteria: Graduate

Code: 03
Title: Standard
Priority: 3

Tuition and Fees	$7,000
Room and Board	$1,500
Books and Supplies	$800
Transportation	$750
Miscellaneous	$800

Create the Record

1. Select **Tools/Setup/Packaging/Budgets** from the menu bar.
2. Click **Add** to create a new record.
3. Type the Budget Code.
4. Type the Priority.
5. Type a descriptive title.
6. Click on the **ellipsis** button to select one of the queries you created.
7. Type the amounts that apply to the budget.
8. Add any user-defined budget fields and amounts.
9. When complete, click **Save**.

Establish Cost-of-Attendance Budget Worksheet

1. Establish an up to four-character alphanumeric code.

2. Establish a priority number.

3. Enter up to fifty (50) characters to create a free-form title.

4. Select a Query (see Chapter 2) from the list of Queries previously entered. This budget is assigned to the students selected by the Query identified in this field.

Budget Area	Dollar Amount	User Defined Budget Area	User Amount
Tuition & Fees			
Room & Board			
Books & Supplies			
Transportation			
Miscellaneous			

Total	

Establish Cost-of-Attendance Budget Worksheet

1. Establish an up to four-character alphanumeric code.

2. Establish a priority number.

3. Enter up to fifty (50) characters to create a free-form title.

4. Select a Query (see Chapter 2) from the list of Queries previously entered. This budget is assigned to the students selected by the Query identified in this field.

Budget Area	Dollar Amount	User Defined Budget Area	User Amount
Tuition & Fees			
Room & Board			
Books & Supplies			
Transportation			
Miscellaneous			

Total	

Establish Cost-of-Attendance Budget Worksheet

1. Establish an up to four-character alphanumeric code.

2. Establish a priority number.

3. Enter up to fifty (50) characters to create a free-form title.

4. Select a Query (see Chapter 2) from the list of Queries previously entered. This budget is assigned to the students selected by the Query identified in this field.

Budget Area	Dollar Amount	User Defined Budget Area	User Amount
Tuition & Fees			
Room & Board			
Books & Supplies			
Transportation			
Miscellaneous			

Total	

Stage 1—Step 4—Document Tracking

A. Create the following documents:

- Student's Tax Return
  Use criteria for Independent students selected for verification (query set up in App Processing)
  Check Automatic Request
  Check Required for Packaging
- Parent's Tax Return
  Use criteria for Dependent students selected for verification
  Check Automatic Request
- Promissory Note
- Entrance Interview form

1. From the main menu select **Tools/Setup/Global/Document Tracking**.
2. Select **Add** to create a new record.
3. Type the document Code.
4. Type the Priority.
5. Type the applicable Year.
6. Type the Description.
7. Select a query, if applicable.
8. Check other questions, if applicable.
9. When complete, click **Save**.

B. Add the Documents

To add documents to the records in your database, select **Process, Add Documents** from the menu bar.

C. Create Document Tracking Letter Text

Add text for your document tracking letters. Be creative.

1. Select **Tools/Setup/Global/User Defined Text/Doc Tr Letter Text**.
2. Type the information for the letter.
3. Click **OK**.

D. Print the Document Tracking Letters

1. Select **File/Print** from the menu bar.
2. Click the **Global** tab.
3. Click the down arrow in the Report Type text box to view the types of files that you can print.
4. Select **Document Tracking Letter**.
5. Click the **Multiple** button to the right of the Report Type text box.
6. Click **Screen** as the output destination.
7. Click the down arrow in the Sort Order box and select Last Name Order, SSN Order.
8. (optional) Click the **Selection Criteria** button if you want to use specific selection criteria.
9. Select any of the various options that appear below the Sort Order text box, such as Permanent Address.
10. Click **OK** to print.
11. Click **OK** when you're finished.

Defining Documents Worksheet

1. **Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-digit alphanumeric).

Code:

2. **Year:** Enter the year(s), if applicable, for the document being requested. This prints on reports and on the Document Tracking section of the student's record (9-digit alphanumeric).

Year:

3. **Description:** Enter a freeform description of the document. The description prints on the Document Tracking letter as the item being requested (50-digit alphanumeric).

Description:

4. **Criteria:** Enter Query to select the records that the document tracking code is written to.

Criteria:

5. **Automatic Request?** Do you wish this document to be automatically requested when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages these financial aid applicants?

Required for Packaging? Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested from only those students who have been selected for verification by the CPS?

Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be sent to those applicants whose ISIR records contain one of the following comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Defining Documents Worksheet

1. **Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-digit alphanumeric).

Code:

2. **Year:** Enter the year(s), if applicable, for the document being requested. This prints on reports and on the Document Tracking section of the student's record (9-digit alphanumeric).

Year:

3. **Description:** Enter a freeform description of the document. The description prints on the Document Tracking letter as the item being requested (50-digit alphanumeric).

Description:

4. **Criteria:** Enter Query to select the records that the document tracking code is written to.

Criteria:

5. **Automatic Request?** Do you wish this document to be automatically requested when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages these financial aid applicants?

Required for Packaging? Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested from only those students who have been selected for verification by the CPS?

Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be sent to those applicants whose ISIR records contain one of the following comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Defining Documents Worksheet

1. **Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-digit alphanumeric).

Code:

2. **Year:** Enter the year(s), if applicable, for the document being requested. This prints on reports and on the Document Tracking section of the student's record (9-digit alphanumeric).

Year:

3. **Description:** Enter a freeform description of the document. The description prints on the Document Tracking letter as the item being requested (50-digit alphanumeric).

Description:

4. **Criteria:** Enter Query to select the records that the document tracking code is written to.

Criteria:

5. **Automatic Request?** Do you wish this document to be automatically requested when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages these financial aid applicants?

Required for Packaging? Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested from only those students who have been selected for verification by the CPS?

Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be sent to those applicants whose ISIR records contain one of the following comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Defining Documents Worksheet

1. **Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-digit alphanumeric).

Code:

2. **Year:** Enter the year(s), if applicable, for the document being requested. This prints on reports and on the Document Tracking section of the student's record (9-digit alphanumeric).

Year:

3. **Description:** Enter a freeform description of the document. The description prints on the Document Tracking letter as the item being requested (50-digit alphanumeric).

Description:

4. **Criteria:** Enter Query to select the records that the document tracking code is written to.

Criteria:

5. **Automatic Request?** Do you wish this document to be automatically requested when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages these financial aid applicants?

Required for Packaging? Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested from only those students who have been selected for verification by the CPS?

Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be sent to those applicants whose ISIR records contain one of the following comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Stage 1—Step 5—Fund Maintenance

Create the following funds. Use selection criteria whenever you see applicable for funds such as work study or scholarships.

Fund	Aid Type	Beginning Balance
Federal Pell Grant	F	99,999,999
Federal SEOG	E	275,000
Federal Work Study	W	400,000
Federal PLUS Loan	P	99,999,999
Chamber of Commerce	O	60,000
Subsidized Stafford Loan	S	99,999,999
Unsubsidized Stafford Loan	U	99,999,999
Science Scholarship	G	115,000

1. Select **Tools/Setup/Packaging/Fund Maintenance** from the menu bar.
2. Click **Add** to create a new record.
3. Type a Fund Code.
4. Type a Fund Description.
5. Select the appropriate Aid Type.
6. If using a query, click the criteria **ellipsis** button and select the desired query.
7. Type the Beginning Balances.
8. When finished, click **Save**.
9. Continue until all funds have been added.
10. Click **OK** when complete.

Fund Worksheet

1. Enter up to eight characters to create a free-form Fund Code.

2. Enter up to 25 characters to create a free-form Fund Description.

3. Select an Aid Type.

E = FSEOG
F = Pell
G = Any grant or scholarship
K = Perkins
W = Work Study
L = Other Need-Based Loan
U = Unsubsidized Stafford
O = Outside
P = PLUS
N = Non-Need Based
S = Subsidized Stafford

4. Enter a Beginning Balance.

Awards are automatically subtracted from the Beginning Balance.
Current (balance) plus Awarded (balance) should equal Beginning Balance if Adjustments are 0.

5. Adjustments increase or decrease a Beginning Balance after the initial entry of fund record.

6. Enter a Query (see Chapter 2) in the Criteria field. (optional)

Loan Criteria provides a way to limit awards for a specific fund based on characteristics. For example, College Work Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Fund Worksheet

1. Enter up to eight characters to create a free-form Fund Code.

2. Enter up to 25 characters to create a free-form Fund Description.

3. Select an Aid Type.

E = FSEOG	L = Other Need-Based Loan
F = Pell	U = Unsubsidized Stafford
G = Any grant or scholarship	O = Outside
K = Perkins	P = PLUS
W = Work Study	N = Non-Need Based
S = Subsidized Stafford	

4. Enter a Beginning Balance.

Awards are automatically subtracted from the Beginning Balance.
Current (balance) plus Awarded (balance) should equal Beginning Balance if Adjustments are 0.

5. Adjustments increase or decrease a Beginning Balance after the initial entry of fund record.

6. Enter a Query (see Chapter 2) in the Criteria field. (optional)

Loan Criteria provides a way to limit awards for a specific fund based on characteristics. For example, College Work Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

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E = FSEOG
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Awards are automatically subtracted from the Beginning Balance.
Current (balance) plus Awarded (balance) should equal Beginning Balance if Adjustments are 0.

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Loan Criteria provides a way to limit awards for a specific fund based on characteristics. For example, College Work Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

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2. Enter up to 25 characters to create a free-form Fund Description.

3. Select an Aid Type.

E = FSEOG
L = Other Need-Based Loan
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4. Enter a Beginning Balance.

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Current (balance) plus Awarded (balance) should equal Beginning Balance if Adjustments are 0.

5. Adjustments increase or decrease a Beginning Balance after the initial entry of fund record.

6. Enter a Query (see Chapter 2) in the Criteria field. (optional)

Loan Criteria provides a way to limit awards for a specific fund based on characteristics. For example, College Work Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

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1. Enter up to eight characters to create a free-form Fund Code.

2. Enter up to 25 characters to create a free-form Fund Description.

3. Select an Aid Type.

E = FSEOG
F = Pell
G = Any grant or scholarship
K = Perkins
W = Work Study
L = Other Need-Based Loan
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O = Outside
P = PLUS
N = Non-Need Based
S = Subsidized Stafford

4. Enter a Beginning Balance.

Awards are automatically subtracted from the Beginning Balance.
Current (balance) plus Awarded (balance) should equal Beginning Balance if Adjustments are 0.

5. Adjustments increase or decrease a Beginning Balance after the initial entry of fund record.

6. Enter a Query (see Chapter 2) in the Criteria field. (optional)

Loan Criteria provides a way to limit awards for a specific fund based on characteristics. For example, College Work Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

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1. Enter up to eight characters to create a free-form Fund Code.

2. Enter up to 25 characters to create a free-form Fund Description.

3. Select an Aid Type.

E = FSEOG	L = Other Need-Based Loan
F = Pell	U = Unsubsidized Stafford
G = Any grant or scholarship	O = Outside
K = Perkins	P = PLUS
W = Work Study	N = Non-Need Based
S = Subsidized Stafford	

4. Enter a Beginning Balance.

Awards are automatically subtracted from the Beginning Balance.
Current (balance) plus Awarded (balance) should equal Beginning Balance if Adjustments are 0.

5. Adjustments increase or decrease a Beginning Balance after the initial entry of fund record.

6. Enter a Query (see Chapter 2) in the Criteria field. (optional)

Loan Criteria provides a way to limit awards for a specific fund based on characteristics. For example, College Work Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Fund Worksheet

1. Enter up to eight characters to create a free-form Fund Code.

2. Enter up to 25 characters to create a free-form Fund Description.

3. Select an Aid Type.

E = FSEOG	L = Other Need-Based Loan
F = Pell	U = Unsubsidized Stafford
G = Any grant or scholarship	O = Outside
K = Perkins	P = PLUS
W = Work Study	N = Non-Need Based
S = Subsidized Stafford	

4. Enter a Beginning Balance.

Awards are automatically subtracted from the Beginning Balance.
Current (balance) plus Awarded (balance) should equal Beginning Balance if Adjustments are 0.

5. Adjustments increase or decrease a Beginning Balance after the initial entry of fund record.

6. Enter a Query (see Chapter 2) in the Criteria field. (optional)

Loan Criteria provides a way to limit awards for a specific fund based on characteristics. For example, College Work Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Stage 1—Step 6—Award Methodology

Create three award methodologies using the attributes below. Remember always create one generic methodology that will package students that don't meet criteria established for the others.

Award Methodology Attributes

Methodology 1

Priority 1
Select Undergraduate Students
Self-help aid max 100% Gift aid max 75%

Fund	Priority	Award Range	EFC Range
Scholarship	1	500-1000	0-99999
Work	2	200-5000	0-99999
Substaff	3	200-9999	0-99999
PLUS	4	200-9999	0-99999

Methodology 2

Priority 2
Select Graduate Students
Self-help aid max $99,999 Gift aid max $2,000

Fund	Priority	Award Range	EFC Range
Scholarship	1	50-2250	0-99999
Work	2	200-4500	0-99999
Substaff	3	200-9999	0-99999
Unstaff	4	200-9999	0-99999

Methodology 3

Priority 99
Select all students
Self-help aid max 100% Gift aid max 100%

Fund	Priority	Award Range	EFC Range
Work	1	200-4500	0-99999
Substaff	2	200-9999	0-99999

1. From the main menu select **Tools/Setup/Packaging/Award Methodology**.
2. Click **Add** to create a new record.
3. Type the methodology Code.
4. Select a criteria by clicking the **ellipsis** button, if applicable.
5. Set the Priority.
6. Use **%** or **$** or dollar amount.
7. Type the percentage or dollar amounts for both Self-help and Gift aid max.
8. Click in the first fund row to add the first fund.
9. Click the **down** arrow. Locate and select the fund code.
10. Type the Fund Priority.
11. Type the School Min and Max award amounts.
12. Type the EFC Min and Max level.
13. Move to the next row.
14. Continue until all funds have been added.
15. When complete click **Save**.

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology.	
2. Enter up to 50 characters to create a free-form description of the award methodology.	
3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied.	
4. Use ☐ Percentages ☐ Dollar Amounts for Aid Maximums	
5. Establish a percentage of the total award package that is awarded as self-help aid, either work-study or loans.	
6. Establish a percentage of the total award package that is considered gift aid.	
7. Select a Query that is used to select the group of students for this funding package.	

8. Establish award parameters for specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to be awarded	Identify relative priorities of award methodologies	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology.

2. Enter up to 50 characters to create a free-form description of the award methodology.

3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied.

4. Use ☐ Percentages ☐ Dollar Amounts for Aid Maximums

5. Establish a percentage of the total award package that is awarded as self-help aid, either work-study or loans.

6. Establish a percentage of the total award package that is considered gift aid.

7. Select a Query that is used to select the group of students for this funding package.

8. Establish award parameters for specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to be awarded	Identify relative priorities of award methodologies	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology.

2. Enter up to 50 characters to create a free-form description of the award methodology.

3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied.

4. Use ☐ Percentages ☐ Dollar Amounts for Aid Maximums

5. Establish a percentage of the total award package that is awarded as self-help aid, either work-study or loans.

6. Establish a percentage of the total award package that is considered gift aid.

7. Select a Query that is used to select the group of students for this funding package.

8. Establish award parameters for specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to be awarded	Identify relative priorities of award methodologies	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**

Stage 2—Import ISIRs

Import ISIR data to create packaging records, print a list of unpackaged students, and review the Awards tab.

A. Import ISIR Records

1. From the main menu select **File/Import/Packaging**.
2. Import Type should be ISIR Data.
3. Send the import report to the screen.
4. Select the Academic Year Profile you created in the previous exercise.
5. Click **Selection Criteria**.
6. Click **Select Records**.
7. Choose the records you want to import and click **OK**.
8. Click **OK**.

B. Print a List of Unpackaged Records

1. From the main menu, select **File/Print**.
2. Click the **Packaging** tab.
3. Click the Report field down arrow to locate **List - UnPackaged Students**.
4. Send the report to the screen or printer.
5. Click **OK**.

C. Open a Packaging Record

1. Open and review the results of the import for at least two records.
2. From the main menu select **File/Open**.
3. Click the **ellipsis** button to locate the record.
4. Click **OK**.
5. Click the **Awards** tab.
6. Using the grid below, identify the budget code, Document Tracking Letter status, and remaining need for each student:

	Budget Code	Document Tracking Letter Status	Remaining Need
Student ID			
Student ID			

D. Add an Outside Fund

For one of the records you reviewed, add an outside fund to the Awarded Funds tab.

1. Click the **Awarded Funds** button on the student's record. This will open the Awarded Funds dialog box where you can change the fund code, aid decision, aid type, and/or term disbursement amounts.
2. Click **OK** to save your updates. You will return to the Awards tab.
3. Click **File/Save**.
4. Click **OK**.

Stage 3 —Package the Records

A. Global Package

To use the global package function to package all records that are ready, select **Process/ Package** from the main menu.

The selection criteria box displays.

You will only package students who were processed by college grade level.

B. Print a List of Packaged Records

1. Select **File/Print** from the main menu.
2. Click the down arrow to select the **Report List - Packaged Students by Last Name**.
3. Select the Report destination.
4. Select **Sort Order**.
4. Click **OK**.

C. Open a Packaged Record

Open one the of the packaged records from the list. Review the Awards tab including the Awarded Funds and Funds Not Awarded.

Identify the following for each student you select:

	Award Methodology Used	Awarded Funds Total	Funds Not Awarded and Why	Remaining Need
Student ID				
Student ID				

Why Didn't It Award As Expected?

- Did you create the fund you were trying to award?
- Do all of your funds have a balance to award?
- Are all required documents recorded as received or waived?
- Did you define a minmum and maximum award range for your fund in the award methodology?
- Is there a query restriction at the fund level?
- Did your student(s) meet the criteria of the query you used for your award methodology?

D. Fund Maintenance List

Print a list of your funds.

1. Select **File/Print** from the menu bar.
2. Select the **Packaging** tab.
3. Select the **Report Type: List - Fund Maintenance**.
4. Click **Printer, File**, or **Screen** for the output destination.
5. Click **OK**.

E. Measurement Tools Fund Maintenance

Print the Measurement Tools List for all of your funds.

1. Select **File/Print** from the menu bar.
2. Click the **Packaging** tab.
3. Click the down arrow in the Report Type text box to view the types of files that you can print.
4. Select **Measurement Tools - Funds**.
5. Click **Printer, File**, or **Screen** as the output destination.
6. Click **Multiple** to print multiple reports.
7. Click **OK**.
8. Click the check box next to each fund.
9. Click **OK** to print.

F. Set up Award Letter Text

1. From the main menu, select **Tools/Setup/Global/User Defined Text/Award Letter Text**.
2. Type the text in the free-form area.
3. Click **OK** when finished.

G. Print an Award Letter

1. From the main menu select **File/Print**.
2. Click **Packaging**.
3. Click the down arrow in the Report field to locate **Letters - Award**.
4. Click **Single**.
5. Send the report to the Printer.
6. Type an SSN.
7. Type an Acceptance Date. (Make sure the Packaging Results Default status in Packaging System setup is set to O (Offered).
8. Click to exclude Headings and Signature Block.
9. Click to print User Defined text.
10. Click **OK**.

H. Record Receipt of an Award Letter

Student 1

Find a student that was awarded a PLUS loan.

Open the record to the Awards tab.

Click the **Award Letter** button.

Click the check box for Award Letter Received?

This student declined the PLUS loan on his or her award letter.

Click the **Awarded Funds** button.

Select the Decision field for the PLUS loan.

Set the value to **(D)**ecline.

Click **OK**.

Student 2

Find a packaged student.

Open the record to the Awards tab.

Click the **Award Letter** button.

Click the check box for Award Letter Received?

This student indicated on the award letter that an outside award for $2,000 was awarded.

Click the **Awarded Funds** button.

Add the new fund with the amount spread equally across terms.

Click **OK**.

Since this new amount may affect total eligibility, you will need to repackage the student.

Select **Process, Repackage** from the menu.

Review the results. Did the Awarded Funds Total change? Where there different funds or amounts awarded?

Student 3

Find a packaged student.

Open the record to the Awards tab.

Click the **Award Letter** button.

Click the check box for Award Letter Received?

You have identified this student as part of a program that requires extra lab fees. In order to modify the budget to include the fees, you must first unpackage the student.

Select **Process/Unpackage** from the menu.

Save the changes.

Click the **Budget** button.

Go to the next available row and type **Lab Fees**.

Type the amount as $500.

Click **OK**.

Package the student again.

Select **Process, Package** from the menu.

Save the changes.

Review the results. Did the Awarded Funds Total change? Were there different funds or amounts awarded?

I. User Letters

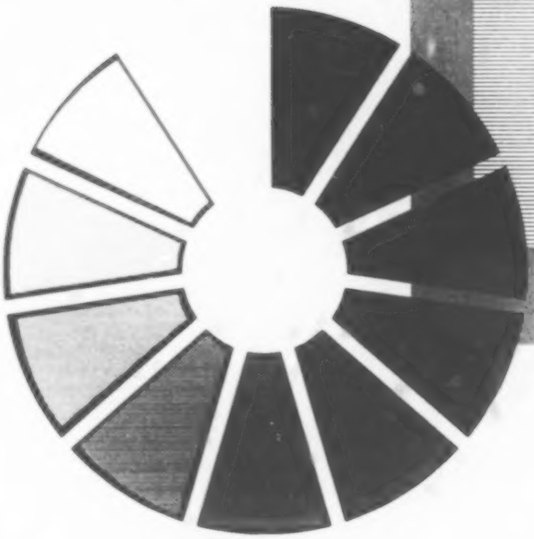
Finally, you will create and print a user letter for students that have received loans. The text of the letter should notify the student to attend an entrance interview session.

Set up User Letter Text

1. From the main menu, select **Tools/Setup/Global/User Defined Text/User Letter Text 1**
2. Type the text in the free-form area.
3. Click **OK** when finished.

Appendix A

File Formats & External Export



A File Formats & External Export

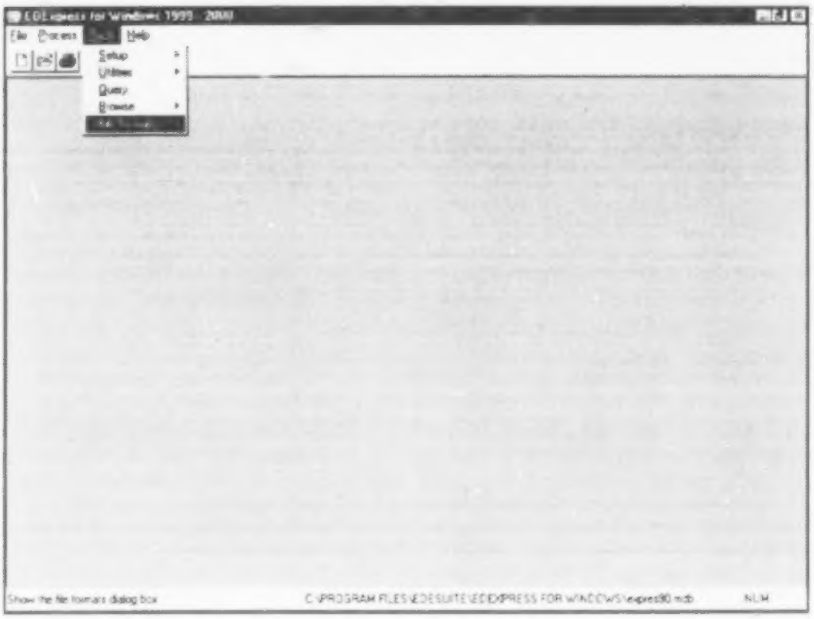
Problem:	You need to pass address information from the financial aid office to the registrar's office.
Solution:	Use the file format utility to identify the fields containing the information. Then export the information to a file in the format you created.

You can save data entry time and maximize your use of the student data you've collected in EDExpress by creating file formats. A file format is like a template that groups and formats the EDExpress student data you specify. You can then use the file format to export data from packaging for the above scenarios or any other purpose such as:

- Matching data to a maintenance or other system.
- Creating a user-defined report.
- Passing award information to the business office.

Creating a File Format

This utility allows you to set up user-defined file formats to use when exporting data to external systems. Before you can export external data, you must establish file formats to format the data for the external systems that will use it.


EDExpress for Windows 1999 - 2000
File
Process
Tools
Help
Setup
Utilities
Query
Browse
File Format

Show the file formats dialog box

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

NUM

Select **Tools, File Format** from the menu bar.

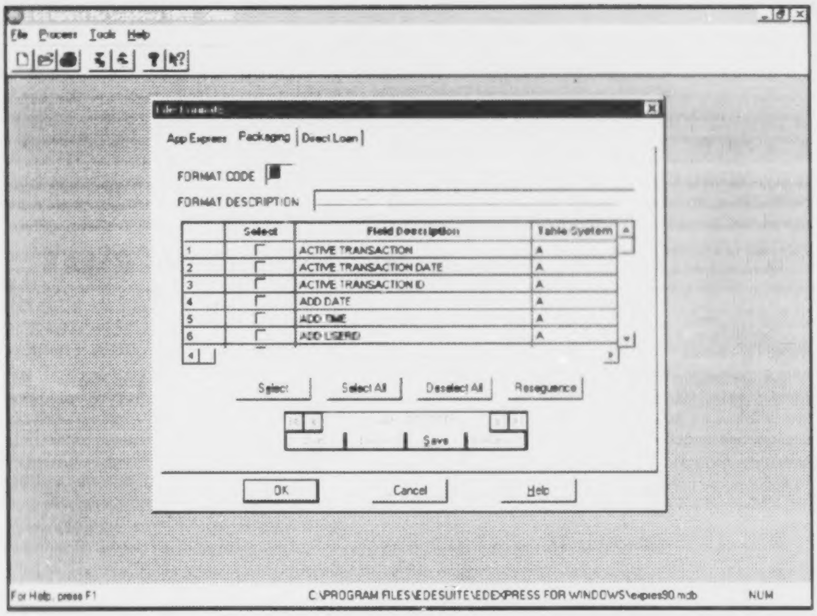
A File Formats & External Export

You can create formats specific to each of the modules in EDExpress

*Click **Packaging***

This is the File Format dialog box.

*Click **Add** to create a new record or begin adding information if this is the first record.*


File Process Tools Help
File Formats
App Express
Packaging
Direct Loan
Select
Select All
Deselect All
Resequence
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

FORMAT CODE

FORMAT DESCRIPTION

	Select	Field Description	Table System
1	☐	ACTIVE TRANSACTION	A
2	☐	ACTIVE TRANSACTION DATE	A
3	☐	ACTIVE TRANSACTION ID	A
4	☐	ADD DATE	A
5	☐	ADD TIME	A
6	☐	ADD USERID	A

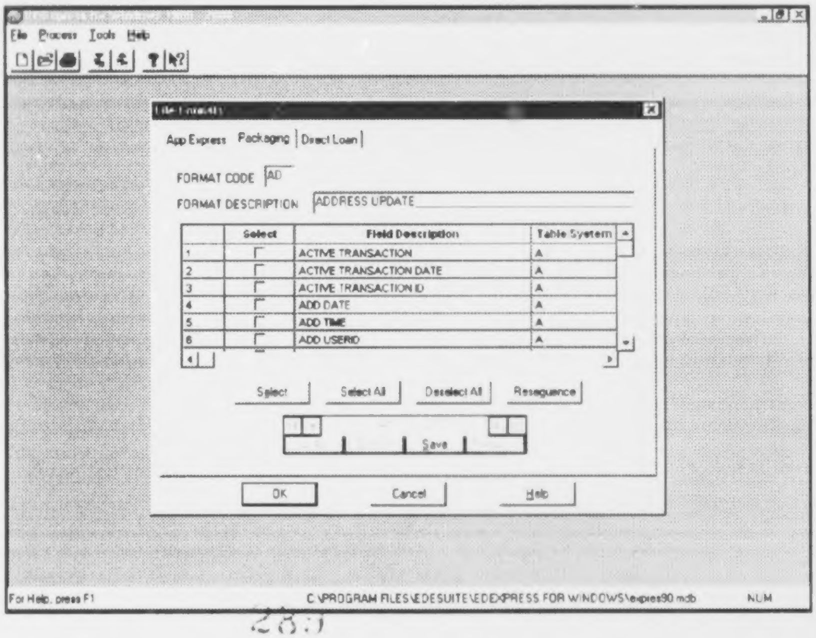
As the solution to our stated problem we want to create a file format for students who have been packaged and have funds for the full term.

First type a format code (up to two characters) to identify the record.

Next, type a description for the format.

Now you need to determine which fields to include. Click the checkbox next to the field you want.

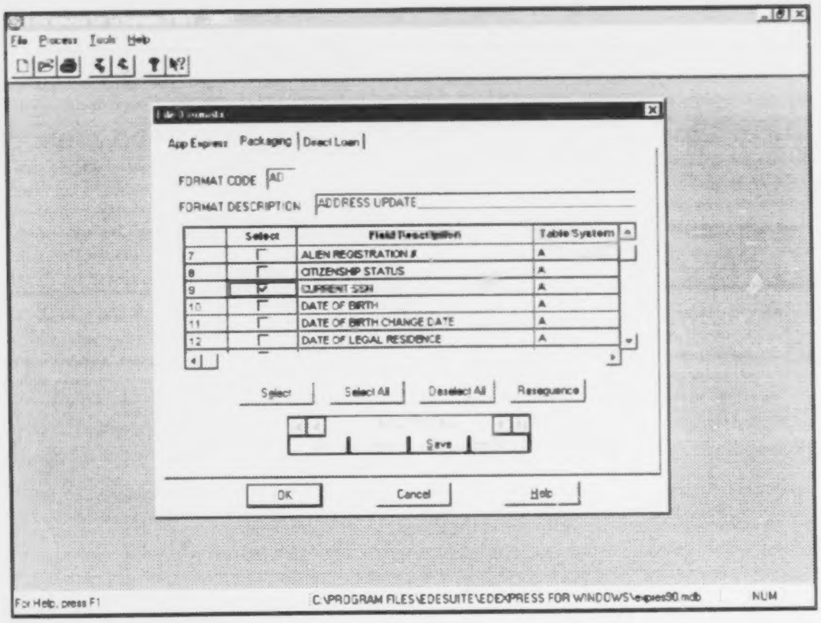
*Click **Current SSN**.*


File Process Tools Help
File Formats
App Express
Packaging
Direct Loan
Select
Select All
Deselect All
Resequence
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

FORMAT CODE AD

FORMAT DESCRIPTION ADDRESS UPDATE

	Select	Field Description	Table System
1	☐	ACTIVE TRANSACTION	A
2	☐	ACTIVE TRANSACTION DATE	A
3	☐	ACTIVE TRANSACTION ID	A
4	☐	ADD DATE	A
5	☐	ADD TIME	A
6	☐	ADD USERID	A


File
Process
Tools
Help
File Formats
App Express
Packaging
Direct Loan
Select
Select All
Deselect All
Resequence
Save
OK
Cancel
Help
For Help, press F1
NUM

FORMAT CODE AD

FORMAT DESCRIPTION ADDRESS UPDATE

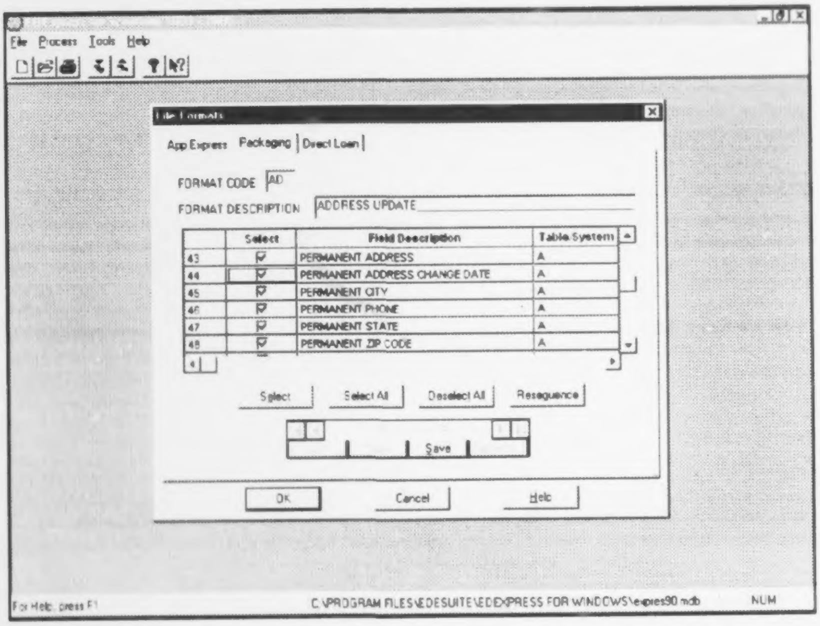
	Select	Field Description	Table System
7	☐	ALIEN REGISTRATION #	A
8	☐	CITIZENSHIP STATUS	A
9	☑	CURRENT SSN	A
10	☐	DATE OF BIRTH	A
11	☐	DATE OF BIRTH CHANGE DATE	A
12	☐	DATE OF LEGAL RESIDENCE	A

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

This dialog box displays all available fields in the packaging database.

Click the check box next to the fields you want.

For this format, we will include the student's current SSN, last name, first name, permanent address, permanent city, permanent state, permanent zip code and permanent address change date.


File
Process
Tools
Help
File Formats
App Express
Packaging
Direct Loan
Select
Select All
Deselect All
Resequence
Save
OK
Cancel
Help
For Help, press F1
NUM

FORMAT CODE AD

FORMAT DESCRIPTION ADDRESS UPDATE

	Select	Field Description	Table System
43	☑	PERMANENT ADDRESS	A
44	☑	PERMANENT ADDRESS CHANGE DATE	A
45	☑	PERMANENT CITY	A
46	☑	PERMANENT PHONE	A
47	☑	PERMANENT STATE	A
48	☑	PERMANENT ZIP CODE	A

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

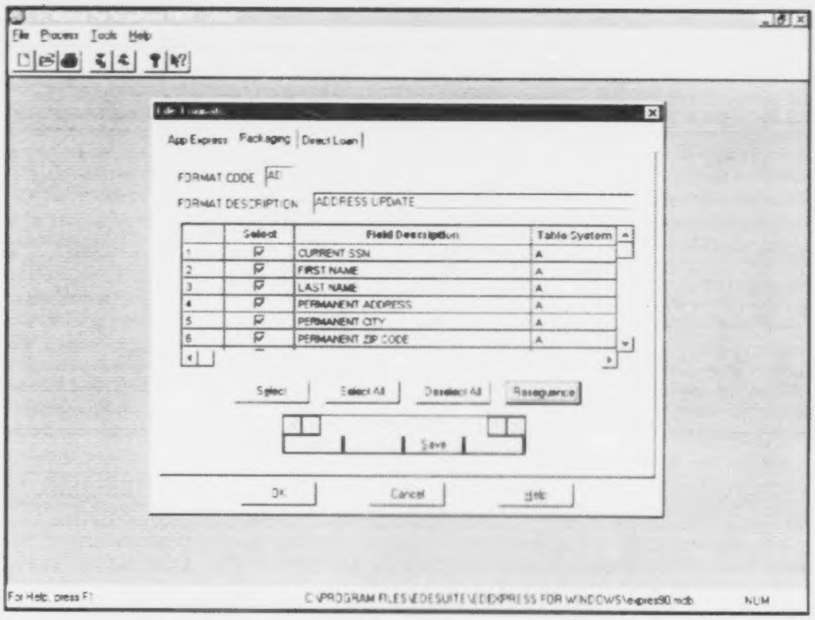
Scroll down to locate and select all desired fields.

Notice that as you select a field, it is assigned a sequence number. This is the order that the fields will appear on the record created.

*Click the **Resequence** button to display the fields in the order assigned.*

The fields now appear in the order we want.

*Click **Save** to save this format.*


File Process Tools Help
App Express
Packaging
Direct Loan
Select
Select All
Deselect All
Resequence
Save
OK
Cancel
Help

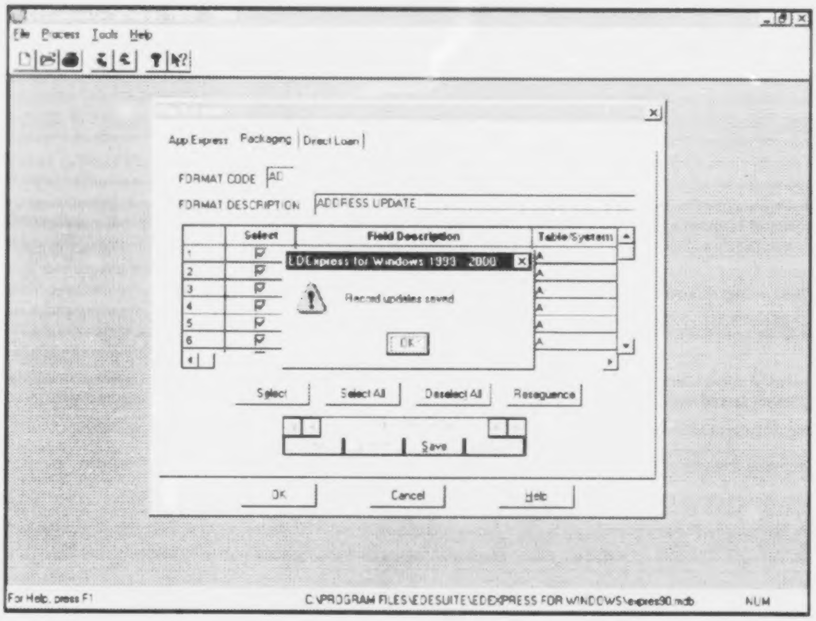
FORMAT CODE AD

FORMAT DESCRIPTION ADDRESS UPDATE

	Select	Field Description	Table System
1	☑	CURRENT SSN	A
2	☑	FIRST NAME	A
3	☑	LAST NAME	A
4	☑	PERMANENT ADDRESS	A
5	☑	PERMANENT CITY	A
6	☑	PERMANENT ZIP CODE	A

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

*Click **OK** to continue*


File Process Tools Help
App Express
Packaging
Direct Loan
Select
Select All
Deselect All
Resequence
Save
OK
Cancel
Help

FORMAT CODE AD

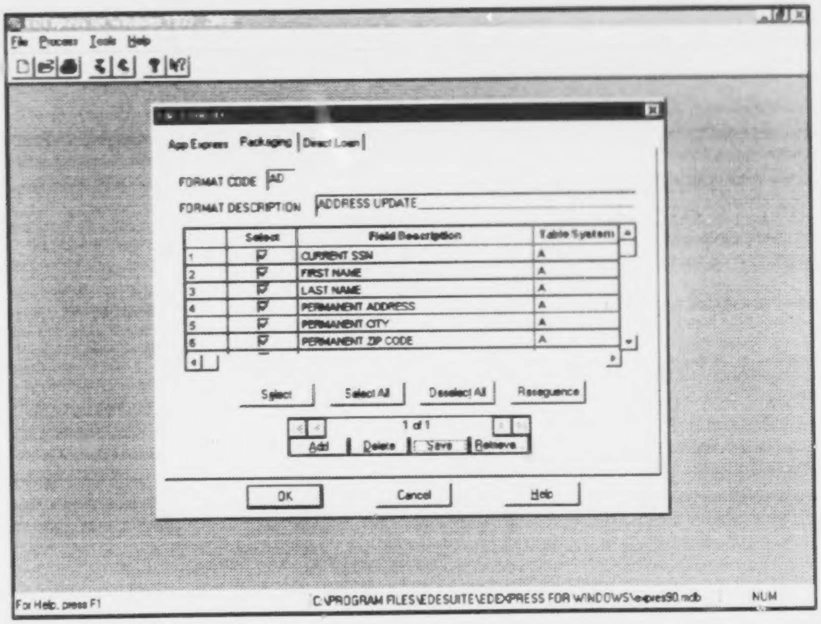
FORMAT DESCRIPTION ADDRESS UPDATE

EDExpress for Windows 1999 - 2000

Record updates saved

OK

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM


File Process Tools Help
App Express
Packaging
Direct Loan
Select
Select All
Deselect All
Resequence
1 of 1
Add
Delete
Save
Retrieve
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

FORMAT CODE AD

FORMAT DESCRIPTION ADDRESS UPDATE

	Select	Field Description	Table System
1	☑	CURRENT SSN	A
2	☑	FIRST NAME	A
3	☑	LAST NAME	A
4	☑	PERMANENT ADDRESS	A
5	☑	PERMANENT CITY	A
6	☑	PERMANENT ZIP CODE	A

This is the completed file format.

Click ***OK*** *to close.*

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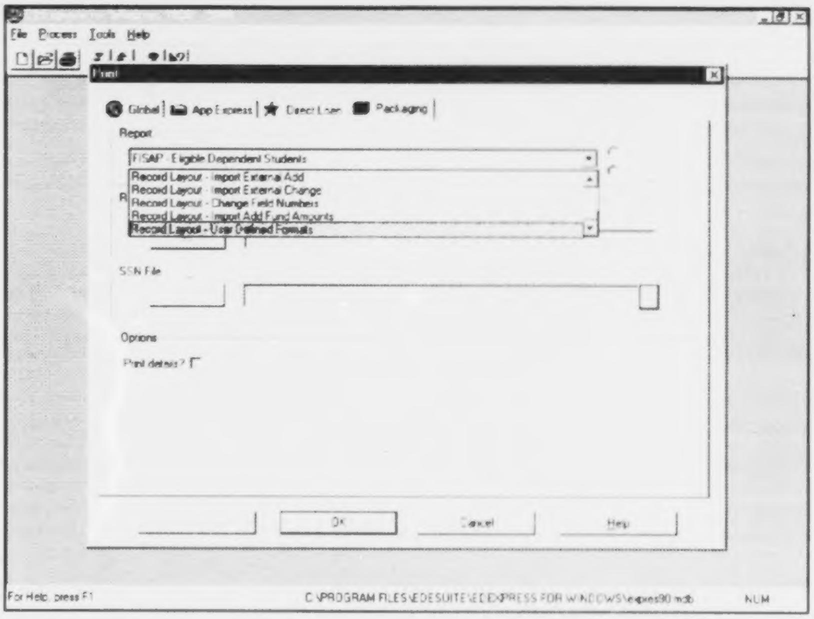
Printing a File Format

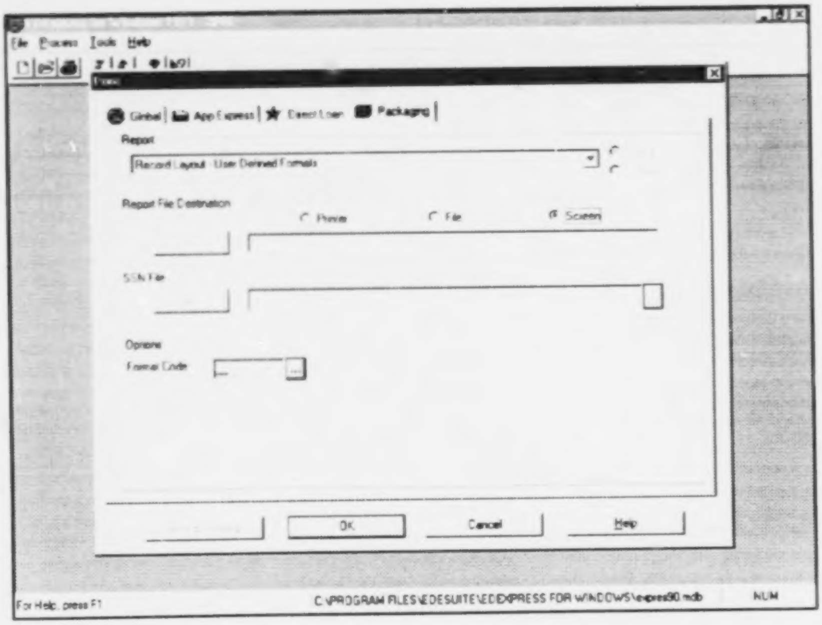
You may need to see exactly what the format layout you created looks like. Using the print function, you can create a report that includes the field lengths, start and end positions, and the total record length.

*Select **File, Print** from the main menu.*

*Click the **Packaging** tab.*

*Select the report **Record Layout - User Defined Formats**.*


File
Process
Tools
Help
Print
Global
App Express
Direct Loan
Packaging
Report
FISAP - Eligible Dependent Students
Record Layout - Import External Add
Record Layout - Import External Change
Record Layout - Change Field Numbers
Record Layout - Import Add Fund Amounts
Record Layout - User Defined Formats
SSN File
Options
Print details? ☐
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM


File Process Tools Help
Global
App Express
Direct Loan
Packaging
Report File Destination
SSN File
Options
OK
Cancel
Help
For Help, press F1
NUM

Report: Record Layout - User Defined Formats

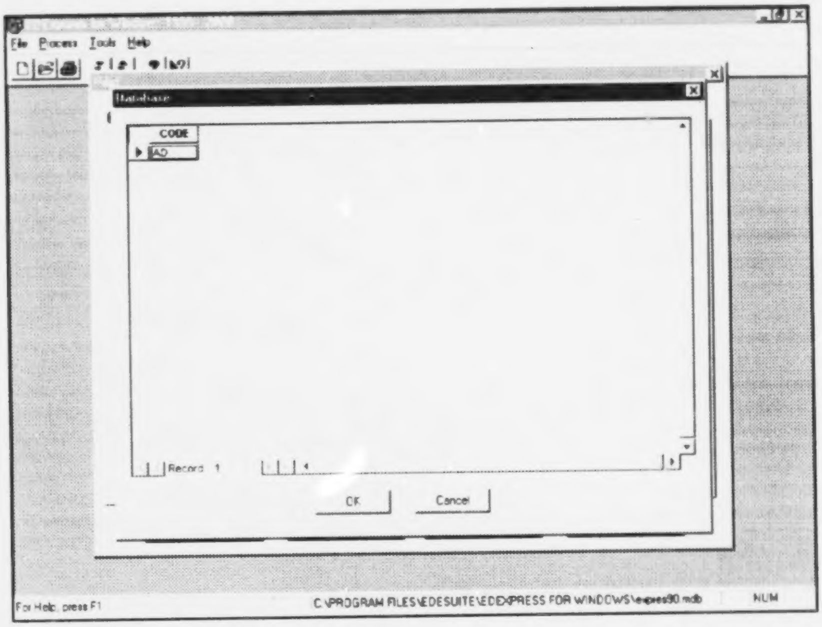
○ Printer ○ File ● Screen

Format Code

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Click **Screen** to view the output on the screen.*

*Click the **ellipsis** button for Format Code to display a list of codes.*


File Process Tools Help
Database
CODE
Record: 1
OK
Cancel
For Help, press F1
NUM

CODE
AD

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Highlight the desired code.

*Click **OK** to close.*

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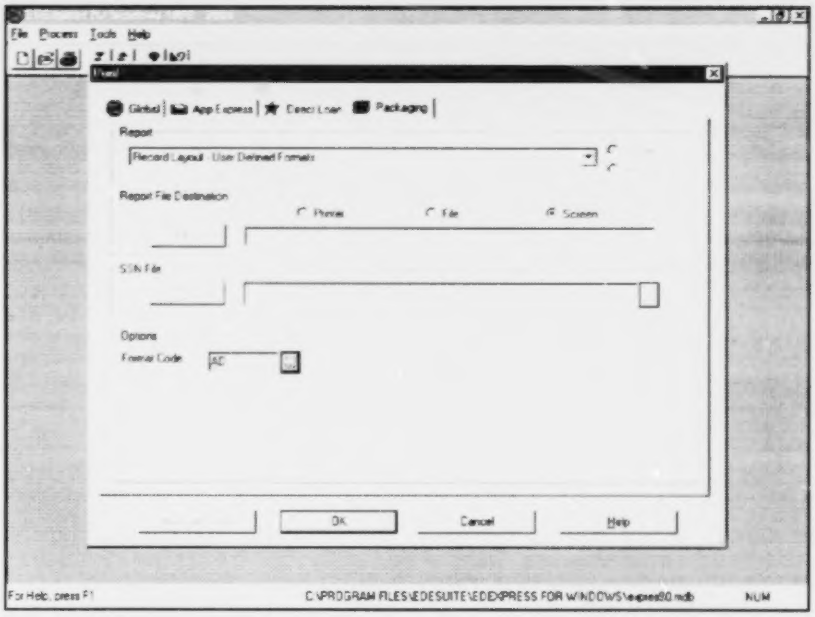
*Click **OK** to print the report.*



File Process Tools Help
Print
Global App Express Direct Loan Packaging
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb
NUM

Report: Record Layout - User Defined Formats

Report File Destination: ○ Printer ○ File ● Screen

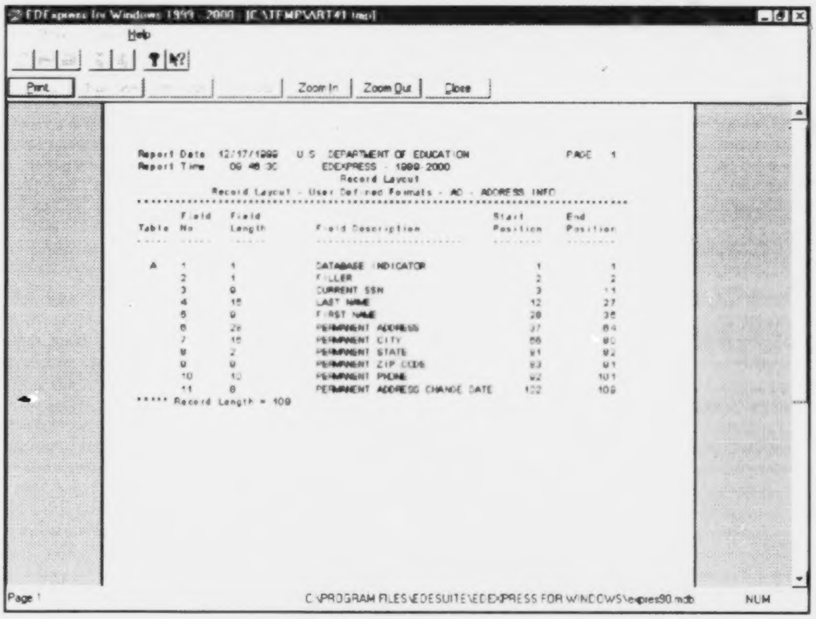
SSN File

Options

Format Code: AD

The printout provides the layout for the format you created.

The record length is provided at the bottom of the form.



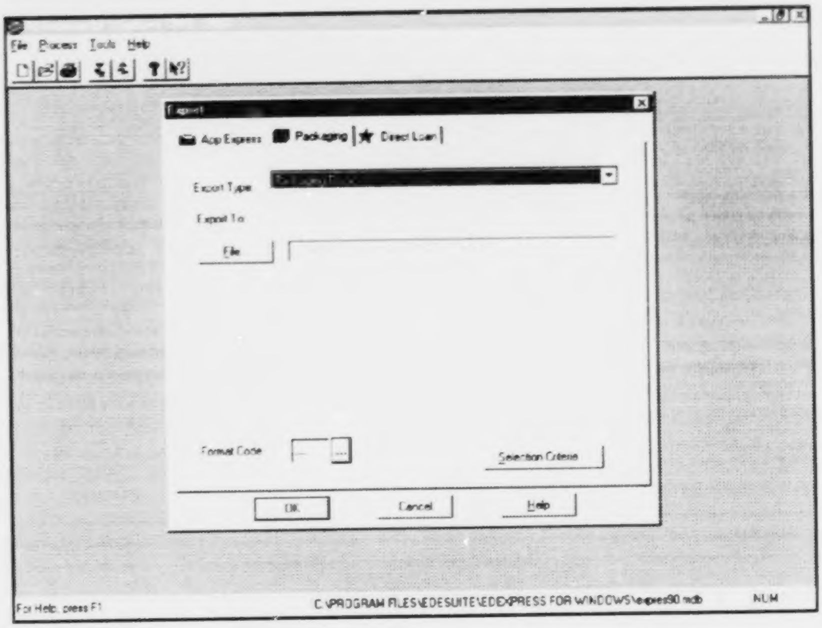
EDExpress for Windows 1999 - 2000 - [C:\TEMP\ART41.tmp]
Help
Print
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\express90.mdb
NUM

```
Report Date   12/17/1999   U.S. DEPARTMENT OF EDUCATION              PAGE  1
Report Time    09:48:30        EDEXPRESS - 1999-2000
                                    Record Layout
          Record Layout - User Defined Formats - AD - ADDRESS INFO
**************************************************************************
        Field   Field                                  Start       End
Table   No      Length     Field Description           Position    Position
-----   -----   ------     ----------------------      --------    --------

  A      1       1         DATABASE INDICATOR               1           1
         2       1         FILLER                           2           2
         3       9         CURRENT SSN                      3          11
         4      16         LAST NAME                       12          27
         5       9         FIRST NAME                      28          36
         6      28         PERMANENT ADDRESS               37          64
         7      16         PERMANENT CITY                  65          80
         8       2         PERMANENT STATE                 81          82
         9       9         PERMANENT ZIP CODE              83          91
        10      10         PERMANENT PHONE                 92         101
        11       8         PERMANENT ADDRESS CHANGE DATE  102         109
***** Record Length = 109
```

Exporting Packaging Data

Now you're ready to create an export file using the file format.


File Process Tools Help
Export
App Express
Packaging
Direct Loan
Export Type
Export To
File
Format Code
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

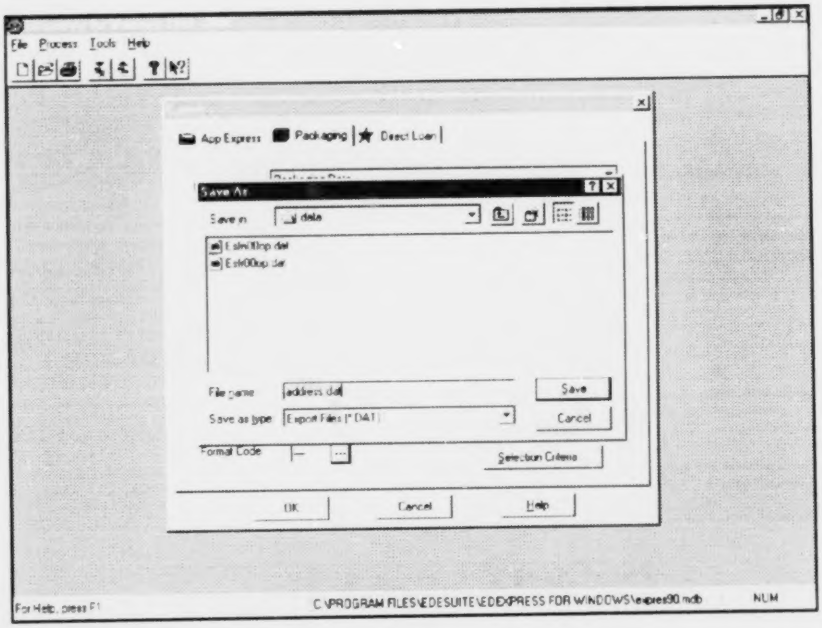
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Select **File, Export** from the menu bar.*

*Click the **Packaging** tab.*

Confirm that Packaging Data appears in the Export Type box.

*Click the **Export To: File** button.*


File Process Tools Help
App Express
Packaging
Direct Loan
Save As
Esini00op.dat
Esti00op.dat
Save
Cancel
Format Code
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Save in: data

File name: address.dat

Save as type: Export Files (*.DAT)

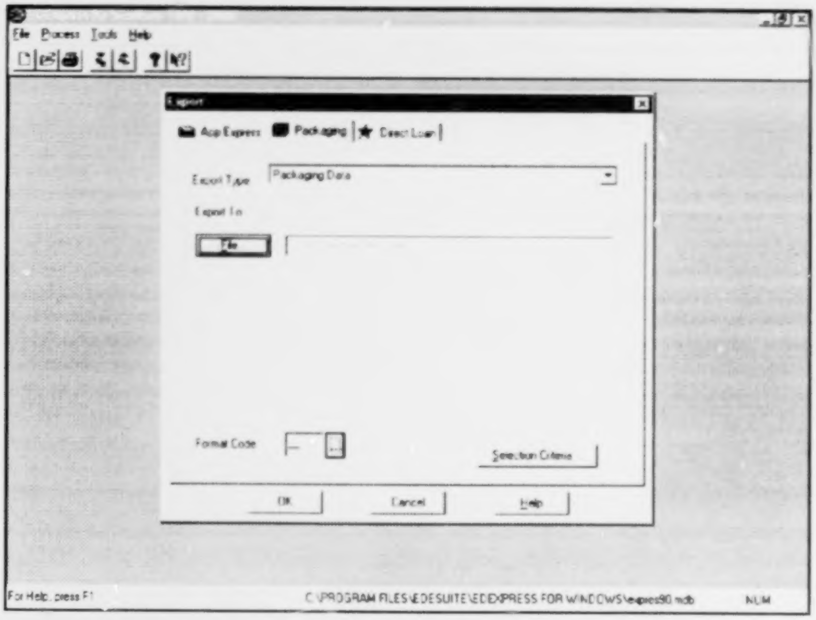
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Confirm that the default path is the one you want. If not, select the desired location.

Type the file name.

*Click **Save**.*

Click the format code ellipsis button to select the file format.

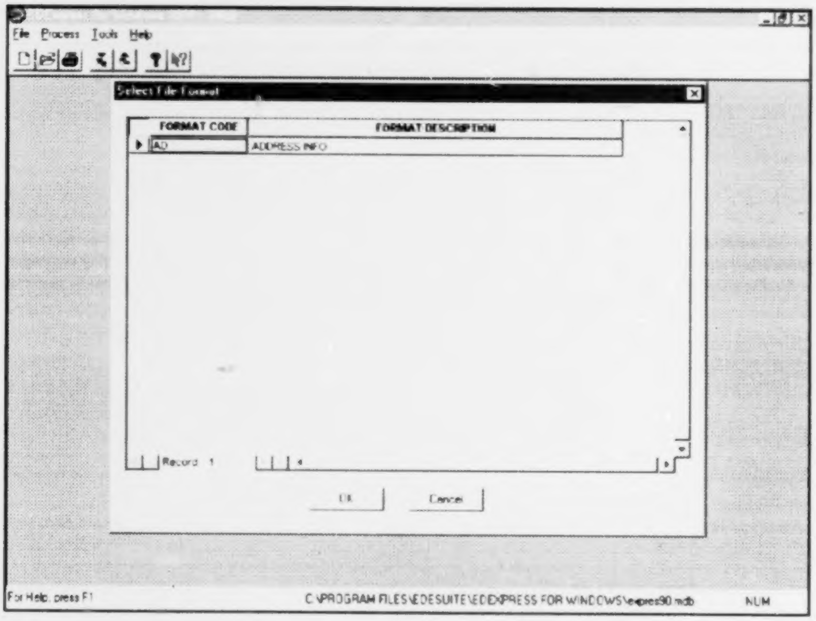

File
Process
Tools
Help
Export
App Express
Packaging
Direct Loan
Export Type
Export To
File
Format Code
...
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Export Type: Packaging Data

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

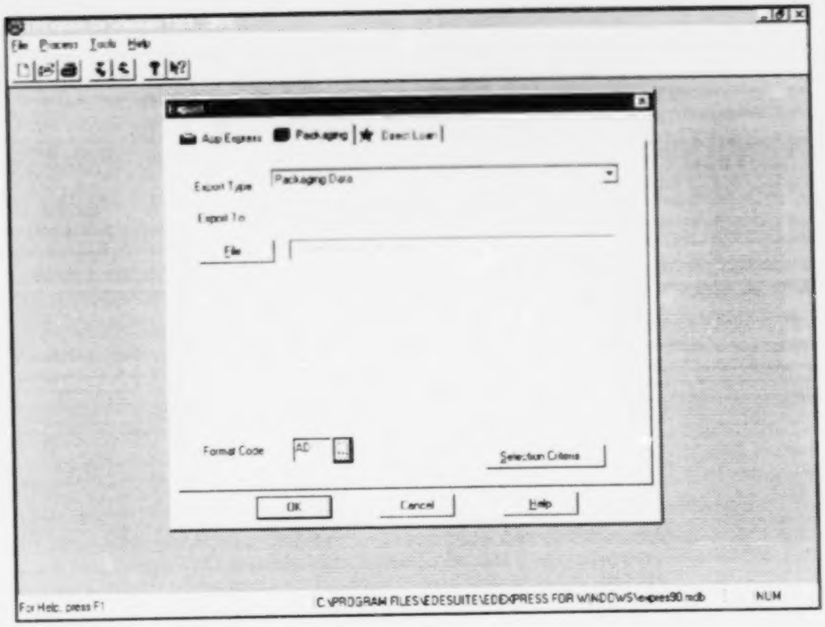
Highlight the desired record.

Click ***OK***.


File
Process
Tools
Help
Select File Format
Record: 1
OK
Cancel
For Help, press F1
NUM

FORMAT CODE	FORMAT DESCRIPTION
AD	ADDRESS INFO

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

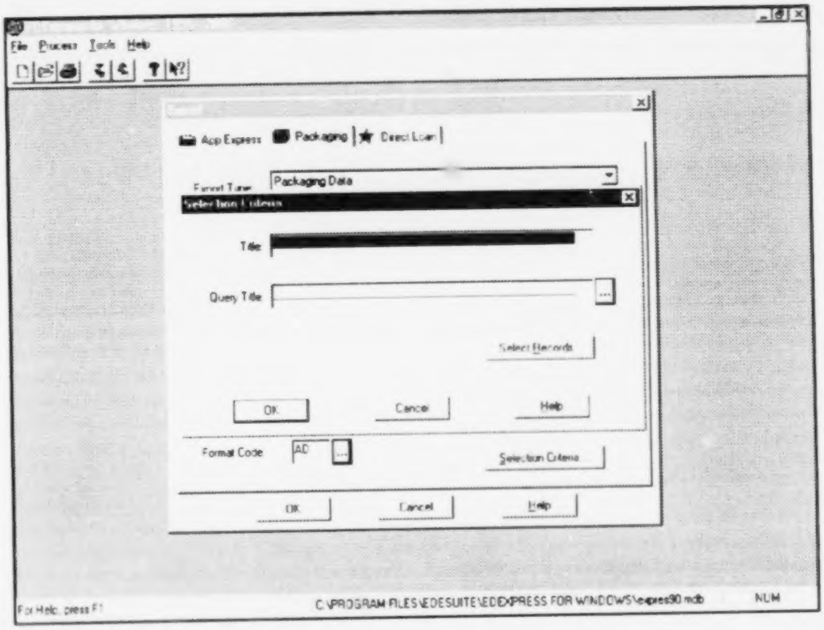

File Process Tools Help
App Express
Packaging
Direct Loan
Export To
File
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Export Type: Packaging Data

Format Code: AD

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Click the **Selection Criteria** button to specify the records to export.*


File Process Tools Help
App Express
Packaging
Direct Loan
Selection Criteria
Title
Query Title
...
Select Records
OK
Cancel
Help
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Export Type: Packaging Data

Format Code: AD

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

Click the ellipsis button to view a list of queries.

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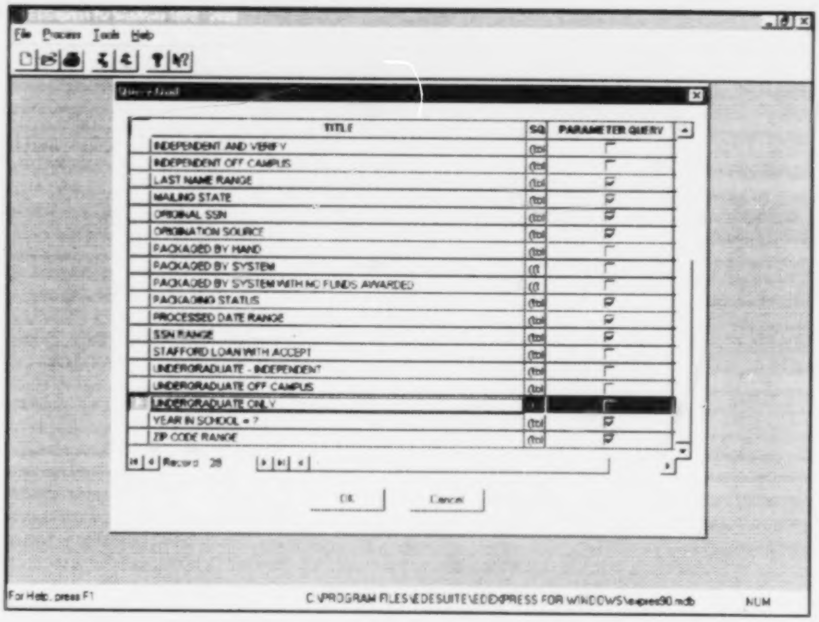
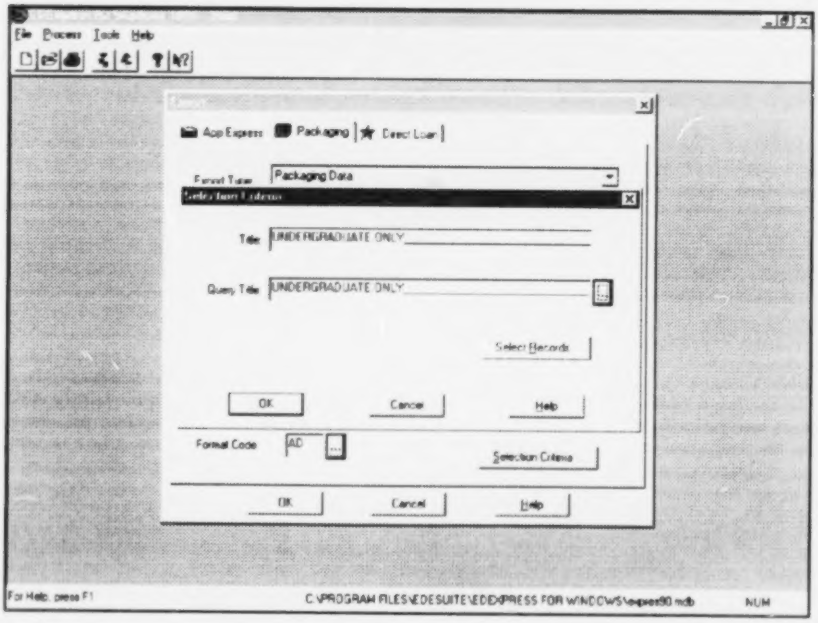
To limit the population to undergraduate students, click ***UNDERGRADUATE ONLY****.*


File Process Tools Help
OK
Cancel
Record 28

TITLE	SQ	PARAMETER QUERY
INDEPENDENT AND VERIFY	(tbl	☐
INDEPENDENT OFF CAMPUS	(tbl	☐
LAST NAME RANGE	(tbl	☑
MAILING STATE	(tbl	☑
ORIGINAL SSN	(tbl	☑
ORIGINATION SOURCE	(tbl	☑
PACKAGED BY HAND	(tbl	☐
PACKAGED BY SYSTEM	((	☐
PACKAGED BY SYSTEM WITH NO FUNDS AWARDED	((	☐
PACKAGING STATUS	(tbl	☑
PROCESSED DATE RANGE	(tbl	☑
SSN RANGE	(tbl	☑
STAFFORD LOAN WITH ACCEPT	(tbl	☐
UNDERGRADUATE - INDEPENDENT	(tbl	☐
UNDERGRADUATE OFF CAMPUS	(tbl	☐
UNDERGRADUATE ONLY		☐
YEAR IN SCHOOL = ?	(tbl	☑
ZIP CODE RANGE	(tbl	☑

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

Click ***OK****.*


File Process Tools Help
App Express
Packaging
Direct Loan
Select Records
OK
Cancel
Help
Selection Criteria
OK
Cancel
Help

Format Type: Packaging Data

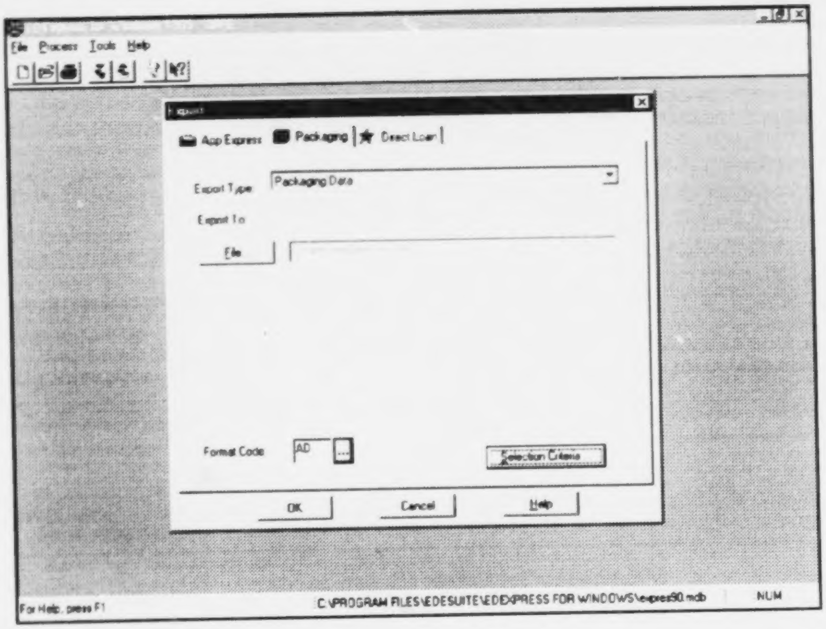
Title: UNDERGRADUATE ONLY

Query Title: UNDERGRADUATE ONLY

Format Code: AD

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb NUM

2519

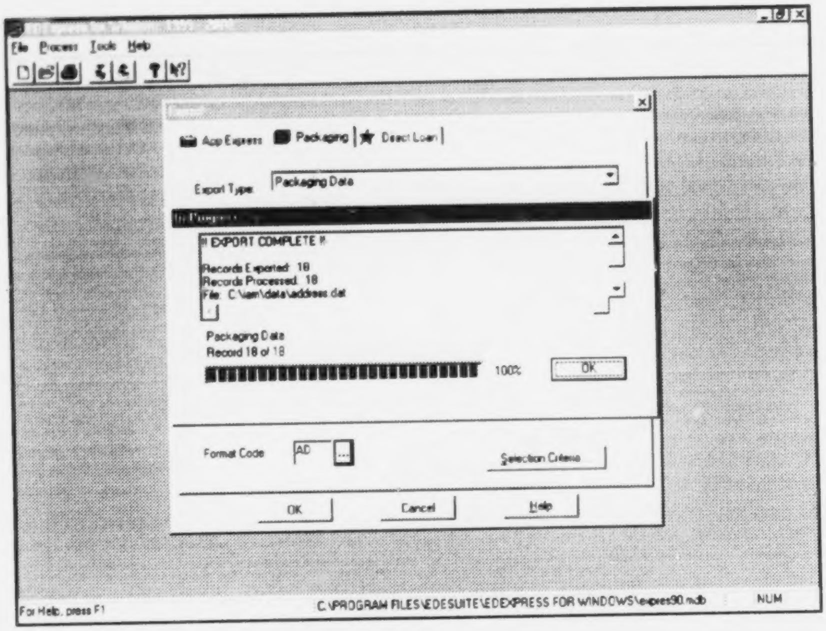

File Process Tools Help
Export
App Express
Packaging
Direct Loan
Export To
File
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Export Type: Packaging Data

Format Code: AD

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

*Click **OK** to export the field.*


File Process Tools Help
App Express
Packaging
Direct Loan
In Progress
OK
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Export Type: Packaging Data

!! EXPORT COMPLETE !!

Records Exported: 18
Records Processed: 18
File: C:\iam\data\address.dat

Packaging Data
Record 18 of 18
100%

Format Code: AD

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

The export has been completed.

*Click **OK** to continue.*

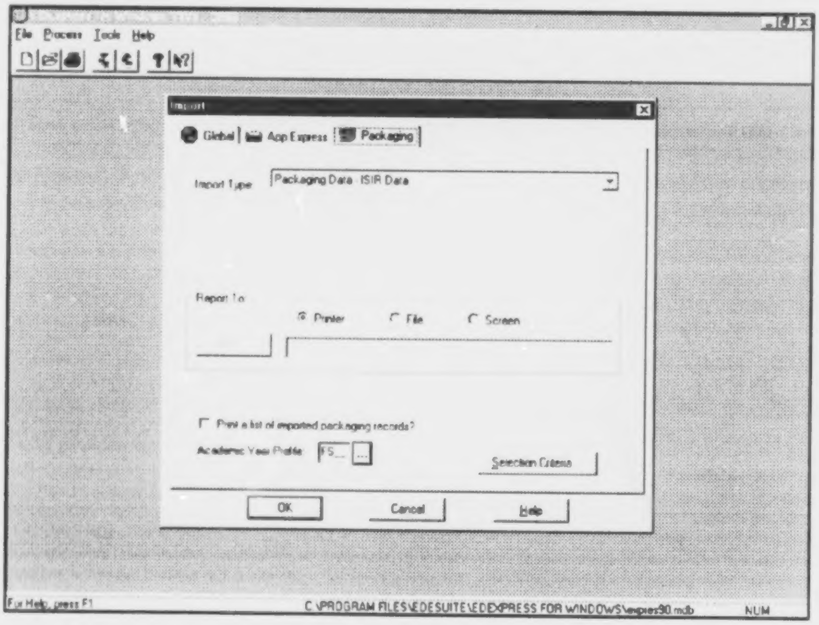
External Import

This import type allows schools to import data from their own institutional systems. Each record runs through field by field editing as well as the save process. All data failing data edits when imported produce a line on an edit report. This report contains a line for each record that has a reject, warning, or is skipped.

You can also import changes to Packaging records in the same way you import data to create records. EDExpress performs field-by-field validation on each record. All data elements failing the validation process are shown on the edit report.

*Click **File/Import**.*

*Select the **Packaging** tab.*

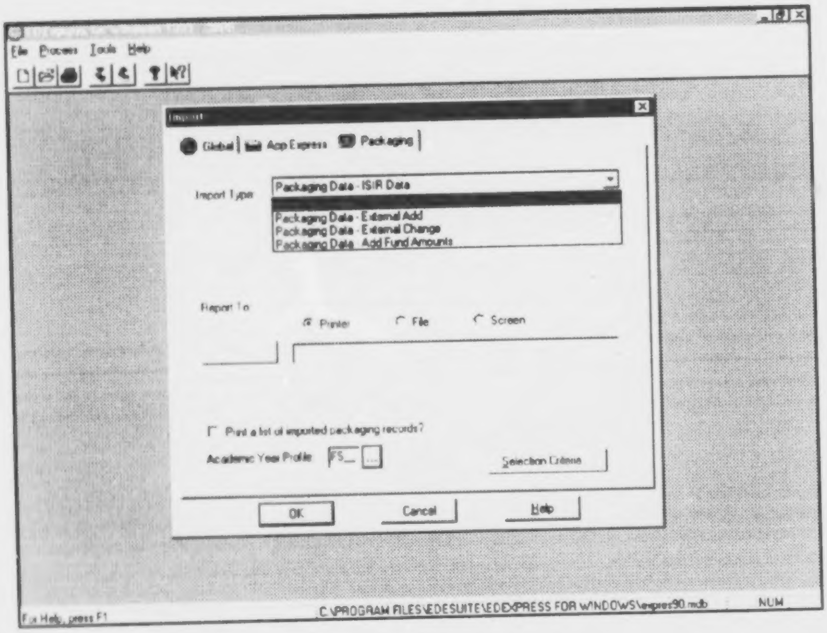

File
Process
Tools
Help
Import
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb
NUM

Import Type: Packaging Data - ISIR Data

Report To: ● Printer ○ File ○ Screen

☐ Print a list of imported packaging records?

Academic Year Profile: FS_


File
Process
Tools
Help
Import
Global
App Express
Packaging
OK
Cancel
Help
Selection Criteria

Import Type: Packaging Data - ISIR Data

Packaging Data - External Add
Packaging Data - External Change
Packaging Data - Add Fund Amounts

Report To: ● Printer ○ File ○ Screen

☐ Print a list of imported packaging records?

Academic Year Profile: FS__

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS\expres90.mdb

NUM

The Import Type box displays a list of available external imports.

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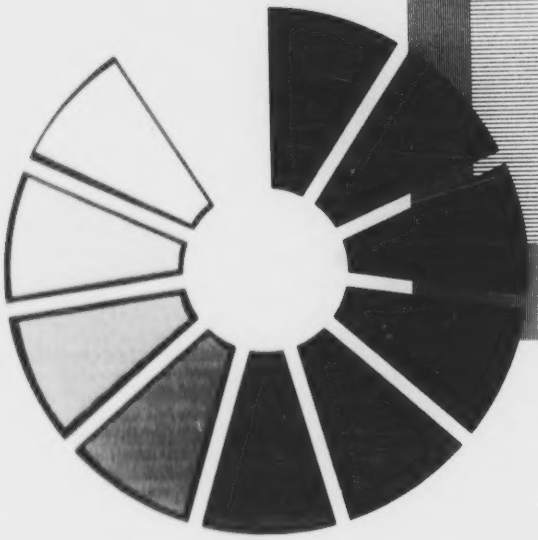
Appendix B

Worksheets



Query Worksheet

In the space below, describe the group of students to be selected.

Data Element	Operators	Value
Select a data field from the ISIR record	=,<>,>,<,>=,<=, like, not like	Enter free from or system assigned value

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

And ☐ Or ☐ Left (☐ Right) ☐

Academic Year Profile Worksheet

Establish a code to identify this Academic Year (up to 4-character alphanumeric).		
Is this Academic Year the default Academic Year?	Yes ☐	No ☐
What is your campus title for this Academic Year? (Free-form)		

Enter Pell Formula

1. ☐	**Standard Term 30 weeks.** (Additional Pell Percentage information is not required.)
2. ☐	**Standard Term less than 30 weeks.** (Provide a Pell Percentage in Pell Proration field.)
3. ☐	**Any Term-based credit hour program.** (Provide a Pell Percentage in Pell % per term boxes.)
4. ☐	**Clock Hour and Credit Hour without terms.** (Provide a Pell Percentage in Pell Proration field.)
5. ☐	**Correspondence Study - Award based on half-time payment schedule.** (Provide a Pell Percentage in Pell Proration field.)
6. ☐	**Correspondence Study - Award based on less than half-time payment schedule.** (Provide a Pell Percentage in Pell Proration field.)

If this is a Proration Academic Year, what is the Proration Percentage? ________% (00 to 99)

What is the EFC program length in months?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☒ 10 ☐ 11 ☐ 12 ☐

Term Breakdown

Term Name (Free-form)	Default Enrollment Status (F, 3/4, 1/2, <1/2, Fall 99 Winter 99, etc.)	Pell % for term	Grant % for term	Perkins % for term	FWS % for term	Loan % for term

Establish Cost-of-Attendance Budget Worksheet

1. Establish an up to four-character alphanumeric code.

2. Establish a priority number.

3. Enter up to fifty (50) characters to create a free-form title.

4. Select a Query (see Chapter 2) from the list of Queries previously entered. This budget is assigned to the students selected by the Query identified in this field.

Budget Area	Dollar Amount	User Defined Budget Area	User Amount
Tuition & Fees			
Room & Board			
Books & Supplies			
Transportation			
Miscellaneous			

Total

Defining Documents Worksheet

1. **Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-digit alphanumeric).

Code:

2. **Year:** Enter the year(s), if applicable, for the document being requested. This prints on reports and on the Document Tracking section of the student's record (9-digit alphanumeric).

Year:

3. **Description:** Enter a freeform description of the document. The description prints on the Document Tracking letter as the item being requested (50-digit alphanumeric).

Description:

4. **Criteria:** Enter Query to select the records that the document tracking code is written to.

Criteria:

5. **Automatic Request?** Do you wish this document to be automatically requested when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages these financial aid applicants?

Required for Packaging? Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested from only those students who have been selected for verification by the CPS?

Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be sent to those applicants whose ISIR records contain one of the following comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Packaging Record Review Worksheet	
Has the student been packaged?	Yes ☐ No ☐
How do you know?	
Does the student have any outstanding documents that are required for packaging?	Yes ☐ No ☐
How do you know?	
How was this record created?	
Is the student ready to be packaged?	Yes ☐ No ☐
How do you know?	
Is this student likely to receive work study?	Yes ☐ No ☐

Fund Worksheet

1. Enter up to eight characters to create a free-form Fund Code.

2. Enter up to 25 characters to create a free-form Fund Description.

3. Select an Aid Type.

E = FSEOG	L = Other Need-Based Loan
F = Pell	U = Unsubsidized Stafford
G = Any grant or scholarship	O = Outside
K = Perkins	P = PLUS
W = Work Study	N = Non-Need Based
S = Subsidized Stafford	

4. Enter a Beginning Balance.

Awards are automatically subtracted from the Beginning Balance.
Current (balance) plus Awarded (balance) should equal Beginning Balance if Adjustments are 0.

5. Adjustments increase or decrease a Beginning Balance after the initial entry of fund record.

6. Enter a Query (see Chapter 2) in the Criteria field. (optional)

Loan Criteria provides a way to limit awards for a specific fund based on characteristics. For example, College Work Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology.

2. Enter up to 50 characters to create a free-form description of the award methodology.

3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied.

4. Use ☐ Percentages ☐ Dollar Amounts for Aid Maximums

5. Establish a percentage of the total award package that is awarded as self-help aid, either work-study or loans.

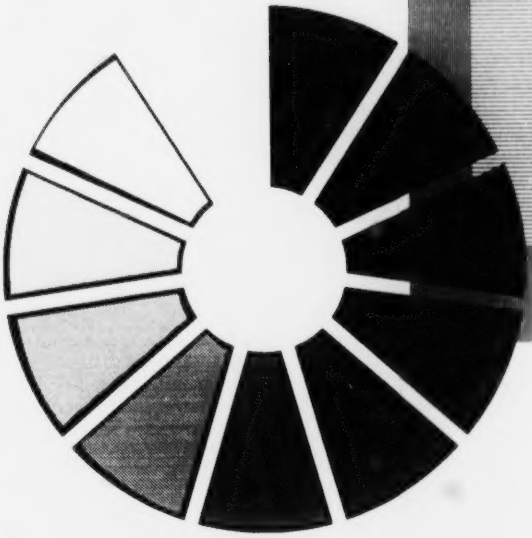
6. Establish a percentage of the total award package that is considered gift aid.

7. Select a Query that is used to select the group of students for this funding package.

8. Establish award parameters for specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to be awarded	Identify relative priorities of award methodologies	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**

Appendix C



Print Reports

Report Date: 01/14/1999 U.S. DEPARTMENT OF EDUCATION
Report Time: 14:04:06 EDEXPRESS - 1999-2000
PACKAGING SETUP
THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
****

SYSTEM

Total Number of Award Letters to be Printed per Student?	2
Maximum Number of Award Letters to be Sent per Student?	2
Award Letter Type?	Offer
Allow imported Pell EFC to be modified?	YES
Packaging Results Default Status?	Offered
Priority Deadline Date Type?	P
Priority Deadline Date Type?	P

```
Report Date: 01/14/1999        U.S. DEPARTMENT OF EDUCATION                     PAGE:  2
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                                     PACKAGING SETUP
        THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
******************************************************************************************

ACADEMIC YEAR PROFILE

Code:                                PEL1
Default:                             YES
Title:                               PELL FORMULA 1
Pell Grant Formula:                  Standard Term, 30 weeks or more

Program Proration Percent:                                 0%
EFC program length to import from the ISIR database:      9

Term        Enrollment Status   Pell %    Grants %    Perkins %    FWS %    Loans %
----        -----------------   ------    --------    ---------    -----    -------

FALL        FALL 1999           AUTO      50%         50%          50%      50%

SPRING      SPRING 2000         AUTO      50%         50%          50%      50%
```

```
Report Date: 01/14/1999        U.S. DEPARTMENT OF EDUCATION                    PAGE:  3
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                                    PACKAGING SETUP
      THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*************************************************************************************

FUND MAINTENANCE

Fund Code:                    CHAMBER
Fund Description:             CHAMBER OF COMMERCE
Aid Type:                     O
Criteria:                     GEORGIA

Beginning Balance    Adjustment to Beginning Balance    Funds Awarded    Current Balance
-----------------    -------------------------------    -------------    ---------------
$60,000              $0                                 $2,000           $58,000

FUND MAINTENANCE

Fund Code:                    FSEOG
Fund Description:             FSEOG
Aid Type:                     E
Criteria:                     DEPENDENT STUDENTS

Beginning Balance    Adjustment to Beginning Balance    Funds Awarded    Current Balance
-----------------    -------------------------------    -------------    ---------------
$275,000             $0                                 $0               $275,000

FUND MAINTENANCE

Fund Code:                    PLUS
Fund Description:             FEDERAL PLUS
Aid Type:                     P
Criteria:                     DEPENDENT STUDENTS

Beginning Balance    Adjustment to Beginning Balance    Funds Awarded    Current Balance
-----------------    -------------------------------    -------------    ---------------
$99,999,999          $0                                 $76,711          $99,923,288

FUND MAINTENANCE

Fund Code:                    SCIENCE
Fund Description:             SCIENCE SCHOLARSHIP
Aid Type:                     G
Criteria:                     INDEPENDENT STUDENTS

Beginning Balance    Adjustment to Beginning Balance    Funds Awarded    Current Balance
-----------------    -------------------------------    -------------    ---------------
$115,000             $0                                 $44,000          $71,000

FUND MAINTENANCE

Fund Code:                    SUBSDZED
Fund Description:             SUBSIDIZED
Aid Type:                     S
Criteria:

Beginning Balance    Adjustment to Beginning Balance    Funds Awarded    Current Balance
```

$99,999,999	$0	$118,490	$99,881,509

FUND MAINTENANCE

Fund Code: UNSUB
Fund Description: UNSUBSIDIZED
Aid Type: U
Criteria:

Beginning Balance	Adjustment to Beginning Balance	Funds Awarded	Current Balance
$99,999,999	$0	$24,500	$99,975,499

FUND MAINTENANCE

Fund Code: WORK
Fund Description: FEDERAL WORK STUDY
Aid Type: W
Criteria: WORKING

Beginning Balance	Adjustment to Beginning Balance	Funds Awarded	Current Balance
$400,000	$0	$129,000	$271,000

```
AWARD METHODOLOGY
Code:                                            MET1
Title:                                           SELECTED UNDERGRADS
Priority:                                        1
Use Dollar Amounts (for aid maximums):           NO
Use Percentages (for aid maximums):              YES
Self-Help Aid Maximum:                           100.00
Gift Aid Maximum:                                75.00
Criteria:                                         DEPENDENT STUDENTS

Fund Code     Fund Priority     School Min     School Max     Min EFC     Max EFC
---------     -------------     ----------     ----------     -------     -------

SCIENCE       1                    500           1000            0         99999
WORK          2                    200           5000            0         99999
SUBSDZED      3                    200           9999            0         99999
PLUS          4                    200           9999            0         99999


AWARD METHODOLOGY
Code:                                            MET2
Title:                                           SELECTED GRADS
Priority:                                        2
Use Dollar Amounts (for aid maximums):           YES
Use Percentages (for aid maximums):              NO
Self-Help Aid Maximum:                           7000.00
Gift Aid Maximum:                                2000.00
Criteria:                                         INDEPENDENT STUDENTS

Fund Code     Fund Priority     School Min     School Max     Min EFC     Max EFC
---------     -------------     ----------     ----------     -------     -------

SCIENCE       1                     50           2250            0         99999
WORK          2                    200           4500            0         99999
SUBSDZED      3                    200           9999            0         99999
UNSUB         4                    200           9999            0         99999


AWARD METHODOLOGY
Code:                                            MET3
Title:                                           SELECT ALL STUDENTS
Priority:                                        3
Use Dollar Amounts (for aid maximums):           NO
Use Percentages (for aid maximums):              YES
Self-Help Aid Maximum:                           100.00
Gift Aid Maximum:                                100.00
Criteria:

Fund Code     Fund Priority     School Min     School Max     Min EFC     Max EFC
---------     -------------     ----------     ----------     -------     -------

WORK          1                    200           4500            0         99999
SUBSDZED      2                    200           9999            0         99999
```

BUDGET

Budget Code:	01
Title:	DEPENDENT IN GEORGIA
Priority:	1
Criteria:	GEORGIA

Tuition and Fees Amounts	$ 8,600
Room and Board Amount	$ 3,000
Books and Supplies Amount	$ 800
Transportation Costs Amount	$ 750
Miscellaneous Amount	$ 800
User-Defined 1 Amount	$ 0
User-Defined 2 Amount	$ 0
User-Defined 3 Amount	$ 0
User-Defined 4 Amount	$ 0
User-Defined 5 Amount	$ 0
Budget Total	$ 13,950

BUDGET

Budget Code:	02
Title:	GRADUATE
Priority:	2
Criteria:	INDEPENDENT STUDENTS

Tuition and Fees Amounts	$ 10,500
Room and Board Amount	$ 4,000
Books and Supplies Amount	$ 950
Transportation Costs Amount	$ 1,500
Miscellaneous Amount	$ 800
User-Defined 1 Amount	$ 0
User-Defined 2 Amount	$ 0
User-Defined 3 Amount	$ 0
User-Defined 4 Amount	$ 0
User-Defined 5 Amount	$ 0
Budget Total	$ 17,750

BUDGET

Budget Code:	03
Title:	STANDARD
Priority:	3
Criteria:	DEPENDENT STUDENTS

Tuition and Fees Amounts	$ 7,000
Room and Board Amount	$ 1,500
Books and Supplies Amount	$ 800
Transportation Costs Amount	$ 750
Miscellaneous Amount	$ 800
User-Defined 1 Amount	$ 0
User-Defined 2 Amount	$ 0
User-Defined 3 Amount	$ 0
User-Defined 4 Amount	$ 0

****

User-Defined 5 Amount	$ 0
Budget Total	$ 10,850

```
Report Date: 01/14/1999   U.S. DEPARTMENT OF EDUCATION                PAGE:  1
Report Time:    14:06:58       EDEXPRESS - 1999-2000
                             List - Query Management
*******************************************************************************
Query Title
   Query Criteria                                             Parameter   Pre-defined
-------------------------------------------------------------------------------
ADD DATE RANGE                                                    X           X
    (ADD DATE>="[PARAMETER]") AND
    (ADD DATE<="[PARAMETER]")

BATCH NUMBER                                                      X           X
    (IMPORT BATCH ID="[PARAMETER]")

C CODE                                                            X           X
    (SAR C FLAG="[PARAMETER]")

COLLEGE GRADE LEVEL                                               X           X
    (STD'S YEAR IN COLLEGE="[PARAMETER]")

CURRENT SSN                                                       X           X
    (STUDENT CURRENT SSN="[PARAMETER]")

DEPENDENCY STATUS                                                 X           X
    (DEPENDENCY STATUS="[PARAMETER]")

DEPENDENT STUDENTS
    (DEPENDENCY STATUS="D")

EARLY ANALYSIS                                                    X           X
    (EARLY ADMINISTRATION="[PARAMETER]")

EFC RANGE                                                         X           X
    (EFC>=[PARAMETER]) AND
    (EFC<=[PARAMETER])

GRADUATE STUDENT?                                                             X
    (STD'S YEAR IN COLLEGE="7")

INDEPENDENT STUDENTS
    (DEPENDENCY STATUS="I")

LAST NAME RANGE                                                   X           X
    (LAST NAME>="[PARAMETER]") AND
    (LAST NAME<="[PARAMETER]")

NOT SELECTED FOR VERIFICATION                                                 X
    (VERIFICATION TYPE=NULL)

REJECTED RECORDS                                                  X           X
    (APPLICATION REJECT CODESLIKE"*[PARAMETER]*")

SELECTED FOR VERIFICATION                                                     X
    (VERIFICATION TYPE<>NULL)

SSN RANGE                                                         X           X
    (STUDENT CURRENT SSN>="[PARAMETER]") AND
```

```
*******************************************************************************
Query Title
   Query Criteria                                          Parameter  Pre-defined
-------------------------------------------------------------------------------
    (STUDENT CURRENT SSN<="[PARAMETER]")

TRANSACTION TYPE                                               X          X
    (TRANSACTION TYPE="[PARAMETER]")

ZIP CODE RANGE                                                 X          X
    (PERMANENT ZIP CODE>="[PARAMETER]") AND
    (PERMANENT ZIP CODE<="[PARAMETER]")

ADD DATE RANGE                                                 X          X
    (ADD DATE>="[PARAMETER]") AND
    (ADD DATE<="[PARAMETER]")

CURRENT SSN                                                    X          X
    (CURRENT SSN="[PARAMETER]")

DEPENDENCY STATUS                                              X          X
    (DEPENDENCY STATUS="[PARAMETER]")

DEPENDENT STUDENTS
    (DEPENDENCY STATUS="D")

INDEPENDENT STUDENTS
    (DEPENDENCY STATUS="I")

LAST NAME RANGE                                                X          X
    (LAST NAME>="[PARAMETER]") AND
    (LAST NAME<="[PARAMETER]")

ORIGINAL SSN                                                   X          X
    (ORIGINAL SSN="[PARAMETER]")

SSN RANGE                                                      X          X
    (ORIGINAL SSN>="[PARAMETER]") AND
    (ORIGINAL SSN<="[PARAMETER]")

ZIP CODE RANGE                                                 X          X
    (PERMANENT ZIP CODE>="[PARAMETER]") AND
    (PERMANENT ZIP CODE<="[PARAMETER]")

ADD DATE RANGE                                                 X          X
    (ADD DATE LOAN>="[PARAMETER]") AND
    (ADD DATE LOAN<="[PARAMETER]")

BORROWERS LAST NAME RANGE                                      X          X
    (PARENT BORROWER'S LAST NAME>="[PARAMETER]") AND
    (PARENT BORROWER'S LAST NAME<="[PARAMETER]")

BORROWERS MAILING STATE                                        X          X
    (PARENT BORROWER'S PERM. STATE="[PARAMETER]")
```

```
********************************************************************************
Query Title
   Query Criteria                                       Parameter   Pre-defined
--------------------------------------------------------------------------------

BORROWERS SSN                                                X           X
    (PARENT BORROWER'S CURRENT SSN="[PARAMETER]")

BORROWERS SSN RANGE                                          X           X
    (PARENT BORROWER'S CURRENT SSN>="[PARAMETER]") AND
    (PARENT BORROWER'S CURRENT SSN<="[PARAMETER]")

BORROWERS ZIP CODE RANGE                                     X           X
    (PARENT BORROWER'S PERM. ZIP CODE>="[PARAMETER]") AND
    (PARENT BORROWER'S PERM. ZIP CODE<="[PARAMETER]")

COLLEGE GRADE LEVEL                                          X           X
    (STUDENT'S COLLEGE GRADE LEVEL="[PARAMETER]")

DEPENDENCY STATUS                                            X           X
    (DEPENDENCY STATUS="[PARAMETER]")

DISB. NUMBER RANGE                                           X           X
    (ACT. DISB. #>=[PARAMETER]) AND
    (ACT. DISB. #<=[PARAMETER])

INACTIVE LOANS                                               X           X
    (INACTIVE FLAG="[PARAMETER]")

INSTITUTION RANGE                                            X           X
    (SCHOOL CODE>="[PARAMETER]") AND
    (SCHOOL CODE<="[PARAMETER]")

LOAN AMOUNT APPROVED = ZERO                                              X
    (LOAN AMOUNT APPROVED=00000)

LOAN ORIGINATION DATE RANGE                                  X           X
    (LOAN ORIGINATION DATE>="[PARAMETER]") AND
    (LOAN ORIGINATION DATE<="[PARAMETER]")

LOAN ORIGINATION STATUS                                      X           X
    (LOAN STATUS="[PARAMETER]")

ORIGINAL SSN                                                 X           X
    (ORIGINAL SSN="[PARAMETER]")

ORIGINATION BATCH NUMBER                                     X           X
    (LOAN ORIGINATION BATCH ID="[PARAMETER]")

PLUS LOANS                                                               X
    (LOAN TYPE="P")

PROM NOTE BATCH NUMBER                                       X           X
    (PROM NOTE MANIFEST BATCH ID="[PARAMETER]")
```

Query Title Query Criteria	Parameter	Pre-defined
PROMISSORY NOTE STATUS (PROM NOTE STATUS="[PARAMETER]")	X	X
READY FOR MANIFEST (PROM NOTE TO BE ON MANIFEST=TRUE)		X
STAFFORD LOANS (LOAN TYPE<>"P")		X
STUDENTS CURRENT SSN (CURRENT SSN="[PARAMETER]")	X	X
STUDENTS LAST NAME RANGE (LAST NAME>="[PARAMETER]") AND (LAST NAME<="[PARAMETER]")	X	X
STUDENTS MAILING STATE (PERMANENT STATE="[PARAMETER]")	X	X
STUDENTS SSN RANGE (CURRENT SSN>="[PARAMETER]") AND (CURRENT SSN<="[PARAMETER]")	X	X
STUDENTS ZIP CODE RANGE (PERMANENT ZIP CODE>="[PARAMETER]") AND (PERMANENT ZIP CODE<="[PARAMETER]")	X	X
ATTENDED CAMPUS PELL ID (ATTENDING CAMPUS ID="[PARAMETER]")	X	X
BATCH NUMBER (BATCH ID="[PARAMETER]")	X	X
C CODE (SAR C FLAG="[PARAMETER]")	X	X
CURRENT SSN (CURRENT SSN="[PARAMETER]")	X	X
DEPENDENCY STATUS (DEPENDENCY STATUS="[PARAMETER]")	X	X
EFC RANGE (EFC>="[PARAMETER]") AND (EFC<="[PARAMETER]")	X	X
INSTITUTIONAL CROSS REFERENCE (INSTITUTIONAL CROSS REFERENCE="[PARAMETER]")	X	X

```
*******************************************************************************
Query Title
   Query Criteria                                          Parameter   Pre-defined
-------------------------------------------------------------------------------
LAST NAME RANGE                                                X           X
    (LAST NAME>="[PARAMETER]") AND
    (LAST NAME<="[PARAMETER]")

ORIGINAL SSN                                                   X           X
    (ORIGINAL SSN="[PARAMETER]")

PAYMENT METHODOLOGY                                            X           X
    (PAYMENT METHODOLOGY="[PARAMETER]")

PAYMENT PERIODS                                                X           X
    (NUMBER OF PAYMENT PERIODS IN STUDENT'S SCHOOL YEAR="[PARAMETER]")

SSN RANGE                                                      X           X
    (CURRENT SSN>="[PARAMETER]") AND
    (CURRENT SSN<="[PARAMETER]")

ZIP CODE RANGE                                                 X           X
    (PERMANENT ZIP CODE>="[PARAMETER]") AND
    (PERMANENT ZIP CODE<="[PARAMETER]")

ACADEMIC CALENDAR                                              X           X
    (ACADEMIC YEAR PROFILE="[PARAMETER]")

ADD DATE RANGE                                                 X           X
    (PACKAGING ADD DATE>="[PARAMETER]") AND
    (PACKAGING ADD DATE<="[PARAMETER]")

AWARD METHODOLOGY                                              X           X
    (METHODOLOGY CODE="[PARAMETER]")

COLLEGE GRADE LEVEL                                            X           X
    (COLLEGE GRADE LEVEL="[PARAMETER]")

CURRENT SSN                                                    X           X
    (CURRENT SSN="[PARAMETER]")

DEPENDENCY STATUS                                              X           X
    (DEPENDENCY STATUS="[PARAMETER]")

DEPENDENT STUDENTS
    (DEPENDENCY STATUS="D")

EFC RANGE                                                      X           X
    (EFC>=[PARAMETER]) AND
    (EFC<=[PARAMETER])

GEORGIA
    (DEPENDENCY STATUS="I") AND
    (STATE OF LEGAL RESIDENCE="GA")
```

```
********************************************************************************
Query Title
   Query Criteria                                 Parameter  Pre-defined
--------------------------------------------------------------------------------

GRADUATE STUDENT?                                                 X
    (COLLEGE GRADE LEVEL="7")

INDEPENDENT STUDENTS
    (DEPENDENCY STATUS="I")

LAST NAME RANGE                                       X           X
    (LAST NAME>="[PARAMETER]") AND
    (LAST NAME<="[PARAMETER]")

MAILING STATE                                         X           X
    (PERMANENT STATE="[PARAMETER]")

ORIGINAL SSN                                          X           X
    (STUDENT'S ORIGINAL SSN="[PARAMETER]")

ORIGINATION SOURCE                                    X           X
    (PACKAGING RECORD SOURCE="[PARAMETER]")

PACKAGED BY HAND                                                  X
    (PACKAGING STATUS="H")

PACKAGED BY SYSTEM                                                X
    ((PACKAGING STATUS="P") OR
    (PACKAGING STATUS="M")) AND
    (METHODOLOGY CODE<>"NULL")

PACKAGED BY SYSTEM WITH NO FUNDS AWARDED                          X
    ((PACKAGING STATUS="P") OR
    (PACKAGING STATUS="M")) AND
    (METHODOLOGY CODE<>NULL)

PACKAGING STATUS                                      X           X
    (PACKAGING STATUS="[PARAMETER]")

PROCESSED DATE RANGE                                  X           X
    (PROCESS DATE>="[PARAMETER]") AND
    (PROCESS DATE<="[PARAMETER]")

SSN RANGE                                             X           X
    (CURRENT SSN>="[PARAMETER]") AND
    (CURRENT SSN<="[PARAMETER]")

SUBERS
    (FUND CODE="SUBSDZED") OR
    (FUND AID TYPE="S")

WORKING
    (INTERESTED IN WORK-STUDY="Y")
```

```
*****************************************************************************
Query Title
   Query Criteria                                         Parameter  Pre-defined
-----------------------------------------------------------------------------

ZIP CODE RANGE                                                 X           X
    (PERMANENT ZIP CODE>="[PARAMETER]") AND
    (PERMANENT ZIP CODE<="[PARAMETER]")


                                          Total Queries Defined:         90
```

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Report Date: 01/14/1999   U.S. DEPARTMENT OF EDUCATION             PAGE:  1
Report Time:   14:08:48       EDEXPRESS - 1999-2000
                          DOCUMENT TRACKING LIST BY STUDENT
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*******************************************************************************
LAST                    SOCIAL       NAME    TRANS    RECEIVED      DOCUMENT
NAME                 SECURITY NO.    CODE      #        DATE          CODE
----------------     ------------    ----    -----   ----------   -------------
ALCEDO               033-64-6966     AL       03                  ENTRANCE
                                                                  PROM NOTE

                                                     Subtotal:               2

ALLEN                034-40-2939     AL       10                  ENTRANCE
                                                                  PARNTSTAX
                                                                  PROM NOTE

                                                     Subtotal:               3

AYALA                010-60-8948     AY       01                  ENTRANCE
                                                                  PROM NOTE

                                                     Subtotal:               2

BASSIR               024-56-7087     BA       06                  ENTRANCE
                                                                  PROM NOTE

                                                     Subtotal:               2

BECKER               015-64-6513     BE       06                  ENTRANCE
                                                                  PROM NOTE

                                                     Subtotal:               2

BLOXTON              026-58-2431     BL       07                  ENTRANCE
                                                                  PROM NOTE

                                                     Subtotal:               2

BLUE                 010-60-5569     BL       01                  ENTRANCE
                                                                  PROM NOTE

                                                     Subtotal:               2

CANIZALEZ            022-72-9459     CA       01                  ENTRANCE
                                                                  PROM NOTE

                                                     Subtotal:               2

CANTY                013-58-6237     CA       10                  ENTRANCE
                                                                  PROM NOTE

                                                     Subtotal:               2
```

```
Report Date: 01/14/1999   U.S. DEPARTMENT OF EDUCATION                PAGE:  2
Report Time:   14:08:48        EDEXPRESS - 1999-2000
                       DOCUMENT TRACKING LIST BY STUDENT
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*******************************************************************************
LAST                   SOCIAL           NAME    TRANS     RECEIVED       DOCUMENT
NAME                SECURITY NO.        CODE      #         DATE           CODE
----------------    ------------        ----    -----    ----------    -------------
CERDA-CAMPOS        036-46-2649         CE      08                     ENTRANCE
                                                                       PROM NOTE

                                                      Subtotal:                2

CHAIREZ             020-50-6661         CH      04                     ENTRANCE
                                                                       PROM NOTE
                                                                       STUD TAX

                                                      Subtotal:                3

DO                  015-24-9113         DO      05                     ENTRANCE
                                                                       PROM NOTE

                                                      Subtotal:                2

EGONLANTZ           021-56-7986         EG      01                     ENTRANCE
                                                                       PARNTSTAX
                                                                       PROM NOTE

                                                      Subtotal:                3

GAINES              013-68-2488         GA      01                     ENTRANCE
                                                                       PROM NOTE

                                                      Subtotal:                2

GARCIA              035-48-4493         GA      03                     ENTRANCE
                                                                       PROM NOTE

                                                      Subtotal:                2

HERNANDEZ           022-72-7558         HE      04                     ENTRANCE
                                                                       PROM NOTE

                                                      Subtotal:                2

HUFF                006-96-3950         HU      04                     ENTRANCE
                                                                       PROM NOTE

                                                      Subtotal:                2

IM YOUNG            012-54-3873         IM      08                     ENTRANCE
                                                                       PARNTSTAX
                                                                       PROM NOTE

                                                      Subtotal:                3
```

DOCUMENT TRACKING LIST BY STUDENT

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

****

LAST NAME	SOCIAL SECURITY NO.	NAME CODE	TRANS #	RECEIVED DATE	DOCUMENT CODE
IVANOVA	029-74-9287	IV	08		ENTRANCE PARNTSTAX PROM NOTE
				Subtotal:	3
JACKSON	025-64-3691	JA	06		ENTRANCE PARNTSTAX PROM NOTE
				Subtotal:	3
JESUDASSON	013-60-2522	JE	01		ENTRANCE PROM NOTE
				Subtotal:	2
JONES	004-72-7499	JO	01		ENTRANCE PROM NOTE STUD TAX
				Subtotal:	3
KAZANCHYAN	020-54-7902	KA	03		ENTRANCE PARNTSTAX PROM NOTE
				Subtotal:	3
KIM	028-60-9423	KI	06		ENTRANCE PROM NOTE
				Subtotal:	2
KOVALCHUK	029-78-8981	KO	07		ENTRANCE PROM NOTE
				Subtotal:	2
LABOME	016-72-3168	LA	01		ENTRANCE PROM NOTE
				Subtotal:	2

```
Report Date: 01/14/1999   U.S. DEPARTMENT OF EDUCATION                 PAGE:  4
Report Time:   14:08:48        EDEXPRESS - 1999-2000
                         DOCUMENT TRACKING LIST BY STUDENT
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
********************************************************************************
LAST                   SOCIAL        NAME     TRANS      RECEIVED       DOCUMENT
NAME                SECURITY NO.     CODE       #          DATE           CODE
----------------    ------------     ----     -----     ----------    ------------
LOPEZ               031-60-6825      LO       03                      ENTRANCE
                                                                      PARNTSTAX
                                                                      PROM NOTE

                                                        Subtotal:              3

LYKE-MARSHALL       016-68-5611      LY       04                      ENTRANCE
                                                                      PROM NOTE

                                                        Subtotal:              2

MAMYAN              003-78-9961      MA       01                      ENTRANCE
                                                                      PROM NOTE

                                                        Subtotal:              2

MARIORENZI          027-54-4699      MA       01                      ENTRANCE
                                                                      PROM NOTE

                                                        Subtotal:              2

MATSUMOTO           021-56-7370      MA       10                      ENTRANCE
                                                                      PROM NOTE

                                                        Subtotal:              2

MCCLAIN             013-42-6455      MC       06                      ENTRANCE
                                                                      PARNTSTAX
                                                                      PROM NOTE

                                                        Subtotal:              3

MONTGOMERY          002-38-1474      MO       10                      ENTRANCE
                                                                      PROM NOTE

                                                        Subtotal:              2

MOORE               034-44-1396      MO       01                      ENTRANCE
                                                                      PROM NOTE

                                                        Subtotal:              2

OGUNFIDITIMI        016-52-7407      OG       08                      ENTRANCE
                                                                      PARNTSTAX
                                                                      PROM NOTE

                                                        Subtotal:              3
```

```
*****************************************************************************
LAST                         SOCIAL       NAME    TRANS    RECEIVED      DOCUMENT
NAME                      SECURITY NO.    CODE      #        DATE          CODE
----------------          ------------    ----    -----   ----------   -------------
PEARSON                   002-68-4685     PE       01                  ENTRANCE
                                                                       PROM NOTE

                                                          Subtotal:               2

PENA                      006-96-3951     PE       01                  ENTRANCE
                                                                       PROM NOTE

                                                          Subtotal:               2

PI                        006-84-6590     PI       05                  ENTRANCE
                                                                       PROM NOTE

                                                          Subtotal:               2

PICA                      031-62-5595     PI       08                  ENTRANCE
                                                                       PROM NOTE

                                                          Subtotal:               2

ROBLES                    002-20-1810     RO       06                  ENTRANCE
                                                                       PROM NOTE

                                                          Subtotal:               2

RODRIGUEZ                 025-46-7061     RO       08                  ENTRANCE

                                                          Subtotal:               1

RODRIGUEZ                 024-48-6772     RO       01                  ENTRANCE

                                                          Subtotal:               1

RODRIGUEZ                 025-46-7061     RO       08                  PROM NOTE

                                                          Subtotal:               1

RODRIGUEZ                 024-48-6772     RO       01                  PROM NOTE

                                                          Subtotal:               1

SIMPSON                   022-28-5318     SI       01                  ENTRANCE
                                                                       PROM NOTE

                                                          Subtotal:               2
```

```
                   DOCUMENT TRACKING LIST BY STUDENT
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****************************************************************************
LAST                   SOCIAL         NAME    TRANS    RECEIVED     DOCUMENT
NAME                SECURITY NO.      CODE      #        DATE         CODE
----------------    ------------      ----    -----   ----------  -------------
TRAN                014-29-3457       TR      01                  ENTRANCE
                                                                  PROM NOTE

                                                      Subtotal:             2

VASQUEZ             022-46-5516       VA      01                  ENTRANCE
                                                                  PARNTSTAX
                                                                  PROM NOTE

                                                      Subtotal:             3

VAZQVEZ             029-78-5518       VA      05                  ENTRANCE
                                                                  PROM NOTE

                                                      Subtotal:             2

VOVCHUK             012-36-8768       VO      03                  ENTRANCE
                                                                  PROM NOTE

                                                      Subtotal:             2

ZELAYA              030-52-6161       ZE      10                  ENTRANCE
                                                                  PROM NOTE

                                                      Subtotal:             2

ZOR                 008-48-8196       ZO      04                  ENTRANCE
                                                                  PROM NOTE

                                                      Subtotal:             2

                                             Number of Students:           51

                                                         Total:           110
```

```
Report Date: 01/14/1999   U.S. DEPARTMENT OF EDUCATION                 PAGE:  1
Report Time:   14:10:12       EDEXPRESS - 1999-2000
                             UNPACKAGED RECORD LIST
                                  ALL RECORDS
  THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
******************************************************************************

                                                      FIRST    PACKAGING
  SOCIAL       NAME   TRANS                           NAME       STATUS      EFC
SECURITY NO.   CODE     #         LAST NAME
-----------    ----   -----   ----------------     ---------  ---------  --------
004-72-7499     JO      01     JONES                MARCUS        N        1033
012-36-8768     VO      03     VOVCHUK              KIM           N        6444
020-50-6661     CH      04     CHAIREZ              SAMUEL        N           0

                               Total Students:           3
```

```
Report Date: 01/14/1999   U.S. DEPARTMENT OF EDUCATION                    PAGE:  1
Report Time:    14:11:02     EDEXPRESS - 1999-2000
                          PACKAGED RECORDS LIST BY SSN
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****************************************************************************
  SOCIAL        NAME  TRANS                        FIRST    FUND     AMOUNT    FUND
SECURITY NO.    CODE    #       LAST NAME           NAME    CODE     AWARDED  DECISION
-----------     ----  -----  --------------  --------- -------- -------  --------
002-20-1810      RO     06    ROBLES              JON      SCIENCE  $  2000     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $2000
EFC:    249                              Subtotal Count of Funds: 1

002-38-1474      MO     10    MONTGOMERY          IVAN     SCIENCE  $  2000     A
                                                           SUBSDZED $  2500     A
                                                           WORK     $  4500     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:      0                              Subtotal Count of Funds: 3

003-78-9961      MA     01    MAMYAN              VLADIMIR SUBSDZED $  2625     A
                                                           WORK     $  5000     A

Packaging Status: M   Award Methododology: MET1    Total Funds Awarded: $7625
EFC:      0                              Subtotal Count of Funds: 2

006-84-6590      PI     05    PI                  PATRICIA PLUS     $  3225     A
                                                           SUBSDZED $  2625     A
                                                           WORK     $  5000     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:      0                              Subtotal Count of Funds: 3

006-96-3950      HU     04    HUFF                CONSUELO PLUS     $  9522     A
                                                           SUBSDZED $  1328     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:   9522                              Subtotal Count of Funds: 2

006-96-3951      PE     01    PENA                CONSUELO SCIENCE  $  2000     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $2000
EFC:      0                              Subtotal Count of Funds: 1

008-48-8196      ZO     04    ZOR                 JENNIFER SCIENCE  $  2000     A
                                                           SUBSDZED $  2500     A
                                                           WORK     $  4500     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:      0                              Subtotal Count of Funds: 3

010-60-5569      BL     01    BLUE                SHEILA   PLUS     $  3225     A
                                                           SUBSDZED $  2625     A
                                                           WORK     $  5000     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:   2784                              Subtotal Count of Funds: 3
```

```
Report Date: 01/14/1999   U.S. DEPARTMENT OF EDUCATION                  PAGE:  2
Report Time:    14:11:02       EDEXPRESS - 1999-2000
                           PACKAGED RECORDS LIST BY SSN
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*********************************************************************************
  SOCIAL       NAME  TRANS                          FIRST     FUND     AMOUNT    FUND
SECURITY NO.   CODE    #        LAST NAME            NAME     CODE     AWARDED  DECISION
-----------    ----  -----   --------------      --------- -------- -------  --------

010-60-8948     AY    01     AYALA               NASRIN    SCIENCE  $  2000     A
                                                           SUBSDZED $  2625     A
                                                           UNSUB    $  4000     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $8625
EFC: 10388                            Subtotal Count of Funds: 3

012-54-3873     IM    08     IM YOUNG            SALVADOR  PLUS     $  3225     A
                                                           SUBSDZED $  2625     A
                                                           WORK     $  5000     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:      0                           Subtotal Count of Funds: 3

013-42-6455     MC    06     MCCLAIN             ANGELA    PLUS     $  3225     A
                                                           SUBSDZED $  2625     A
                                                           WORK     $  5000     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:    551                           Subtotal Count of Funds: 3

013-58-6237     CA    10     CANTY               ALLA      SCIENCE  $  2000     O
                                                           SUBSDZED $  2500     O
                                                           WORK     $  4500     O

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:      0                           Subtotal Count of Funds: 3

013-60-2522     JE    01     JESUDASSON          NAVA      SCIENCE  $  2000     A
                                                           SUBSDZED $  2500     A
                                                           WORK     $  4500     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:   1897                           Subtotal Count of Funds: 3

013-68-2488     GA    01     GAINES              BRIAN     SCIENCE  $  2000     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $2000
EFC:      0                           Subtotal Count of Funds: 1

014-29-3457     TR    01     TRAN                          SCIENCE  $  2000     A
                                                           SUBSDZED $  2625     A
                                                           UNSUB    $  4000     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $8625
EFC:      0                           Subtotal Count of Funds: 3

015-24-9113     DO    05     DO                  SILVIA    SCIENCE  $  2000     A
```

```
*******************************************************************************
  SOCIAL      NAME  TRANS                          FIRST    FUND     AMOUNT    FUND
SECURITY NO.  CODE    #       LAST NAME            NAME     CODE     AWARDED  DECISION
-----------   ----  -----  --------------      --------- -------- -------   --------
                                                         SUBSDZED $  2625      A
                                                         UNSUB    $  4000      A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $8625
EFC:      0                          Subtotal Count of Funds: 3

015-64-6513    BE     06    BECKER             IRMA      SCIENCE  $  2000      A
                                                         SUBSDZED $  2500      A
                                                         WORK     $  4500      A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:      0                          Subtotal Count of Funds: 3

016-52-7407    OG     08    OGUNFIDITIMI       SONIA     PLUS     $  2350      A
                                                         SUBSDZED $  3500      A
                                                         WORK     $  5000      A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:  1970                           Subtotal Count of Funds: 3

016-68-5611    LY     04    LYKE-MARSHALL      KELLY     SCIENCE  $  2000      A
                                                         SUBSDZED $  2500      A
                                                         WORK     $  4500      A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:      0                          Subtotal Count of Funds: 3

016-72-3168    LA     01    LABOME             DEBBEY    SCIENCE  $  2000      A
                                                         SUBSDZED $  2500      A
                                                         WORK     $  4500      A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:      0                          Subtotal Count of Funds: 3

020-54-7902    KA     03    KAZANCHYAN         APETNAKUM PLUS     $  3225      A
                                                         SUBSDZED $  2625      A
                                                         WORK     $  5000      A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:   664                           Subtotal Count of Funds: 3

021-56-7370    MA     10    MATSUMOTO          BRENDA    SCIENCE  $  2000      A
                                                         SUBSDZED $  2625      A
                                                         UNSUB    $  4000      A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $8625
EFC:      0                          Subtotal Count of Funds: 3

021-56-7986    EG     01    EGONLANTZ          LACHANDA  PLUS     $  7350      A
```

```
*****************************************************************************
  SOCIAL       NAME  TRANS                          FIRST    FUND     AMOUNT   FUND
SECURITY NO.   CODE    #      LAST NAME             NAME     CODE     AWARDED  DECISION
-----------    ----  -----  --------------    --------- --------  -------  --------
                                                         SUBSDZED $  3500     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:      0                          Subtotal Count of Funds: 2

022-28-5318    SI     01    SIMPSON           EKATERINA PLUS     $  3225     A
                                                         SUBSDZED $  2625     A
                                                         WORK     $  5000     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:      0                          Subtotal Count of Funds: 3

022-46-5516    VA     01    VASQUEZ           NORMA     PLUS     $  8225     A
                                                         SUBSDZED $  2625     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:      0                          Subtotal Count of Funds: 2

022-72-7558    HE     04    HERNANDEZ         ROBERT    PLUS     $  5350     A
                                                         SUBSDZED $  5500     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:  2634                           Subtotal Count of Funds: 2

022-72-9459    CA     01    CANIZALEZ         LANCE     SCIENCE  $  2000     A
                                                         SUBSDZED $  2500     A
                                                         WORK     $  4500     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:      0                          Subtotal Count of Funds: 3

024-56-7087    BA     06    BASSIR            HEE       SCIENCE  $  2000     A
                                                         SUBSDZED $  2500     A
                                                         WORK     $  4500     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:      0                          Subtotal Count of Funds: 3

025-46-7061    RO     08    RODRIGUEZ         JAVIER    PLUS     $   350     A
                                                         SUBSDZED $  5500     A
                                                         WORK     $  5000     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:      0                          Subtotal Count of Funds: 3

025-64-3691    JA     06    JACKSON           ANGELINA  PLUS     $  4376     A
                                                         SUBSDZED $  1474     A
                                                         WORK     $  5000     A
```

```
Report Date: 01/14/1999  U.S. DEPARTMENT OF EDUCATION                PAGE:  5
Report Time:   14:11:02       EDEXPRESS - 1999-2000
                          PACKAGED RECORDS LIST BY SSN
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*******************************************************************************
  SOCIAL        NAME  TRANS                       FIRST    FUND    AMOUNT   FUND
SECURITY NO.    CODE    #      LAST NAME          NAME     CODE    AWARDED  DECISION
-----------     ----  -----  -------------      --------- -------- -------  --------
Packaging Status: P    Award Methododology: MET1    Total Funds Awarded: $10850
EFC:  4376                            Subtotal Count of Funds: 3

026-58-2431      BL     07    BLOXTON           MILTON    SCIENCE  $  2000     A
                                                          SUBSDZED $  2500     A
                                                          WORK     $  4500     A

Packaging Status: P    Award Methododology: MET2    Total Funds Awarded: $9000
EFC:  3396                            Subtotal Count of Funds: 3

027-54-4699      MA     01    MARIORENZI        MARIBEL   PLUS     $  5350     A
                                                          SUBSDZED $  5500     A

Packaging Status: P    Award Methododology: MET1    Total Funds Awarded: $10850
EFC:  1781                            Subtotal Count of Funds: 2

028-60-9423      KI     06    KIM               RONALD    PLUS     $  2350     A
                                                          SUBSDZED $  3500     A
                                                          WORK     $  5000     A

Packaging Status: P    Award Methododology: MET1    Total Funds Awarded: $10850
EFC:     0                            Subtotal Count of Funds: 3

029-74-9287      IV     08    IVANOVA           MARCIA    PLUS     $  4113     A
                                                          SUBSDZED $  1313     A

Packaging Status: P    Award Methododology: MET1    Total Funds Awarded: $5426
EFC:  4098                            Subtotal Count of Funds: 2

029-78-5518      VA     05    VAZQVEZ           MIRIAM    SCIENCE  $  2000     A
                                                          SUBSDZED $  2500     A
                                                          WORK     $  4500     A

Packaging Status: P    Award Methododology: MET2    Total Funds Awarded: $9000
EFC:  5485                            Subtotal Count of Funds: 3

029-78-8981      KO     07    KOVALCHUK         PATRICIA  SCIENCE  $  2000     A
                                                          SUBSDZED $  3500     A
                                                          UNSUB    $  3500     A

Packaging Status: P    Award Methododology: MET2    Total Funds Awarded: $9000
EFC:     0                            Subtotal Count of Funds: 3

030-52-6161      ZE     10    ZELAYA            DARRIN    SCIENCE  $  2000     A
                                                          SUBSDZED $  2500     A
                                                          WORK     $  4500     A

Packaging Status: P    Award Methododology: MET2    Total Funds Awarded: $9000
EFC:  1759                            Subtotal Count of Funds: 3
```

```
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*************************************************************************************
 SOCIAL       NAME  TRANS                        FIRST     FUND      AMOUNT   FUND
SECURITY NO.  CODE    #       LAST NAME           NAME     CODE      AWARDED  DECISION
-----------   ----  -----  -------------       --------- --------  -------  --------

031-60-6825    LO    03    LOPEZ               DAVID     PLUS     $  3225     A
                                                         SUBSDZED $  2625     A
                                                         WORK     $  5000     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:  2220                         Subtotal Count of Funds: 3

031-62-5595    PI    08    PICA                CHENEL    PLUS     $  3225     A
                                                         SUBSDZED $  2625     A
                                                         WORK     $  5000     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:     0                         Subtotal Count of Funds: 3

033-64-6966    AL    03    ALCEDO              JOSANA    SCIENCE  $  2000     A
                                                         SUBSDZED $  5500     A
                                                         UNSUB    $  1500     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:     0                         Subtotal Count of Funds: 3

034-40-2939    AL    10    ALLEN               RAYMOND   CHAMBER  $  2000     A
                                                         PLUS     $  1225     O
                                                         SUBSDZED $  2625     O
                                                         WORK     $  5000     O

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:     0                         Subtotal Count of Funds: 4

035-48-4493    GA    03    GARCIA              SANDRA    SCIENCE  $  2000     A
                                                         SUBSDZED $  3500     A
                                                         UNSUB    $  3500     A

Packaging Status: P   Award Methododology: MET2    Total Funds Awarded: $9000
EFC:     0                         Subtotal Count of Funds: 3

036-46-2649    CE    08    CERDA-CAMPOS        TIMOTHEA  PLUS     $   350     A
                                                         SUBSDZED $  5500     A
                                                         WORK     $  5000     A

Packaging Status: P   Award Methododology: MET1    Total Funds Awarded: $10850
EFC:     0                         Subtotal Count of Funds: 3

                                        Total Count of Student Records: 43

# Indicates students packaged without funds
```

```
Student SSN:    033646966
                                                                   Page 1
                                                     Student ID:   033646966 AL 03
Name:           ALCEDO, JOSANA S     Current SSN:  033646966  Curr Pkg Status:   P

Permanent Address                    Student Status Information
-----------------------------------  -----------------------------------------
  Street  7806 CENTER PKWY APT #345    A/Y Profile      PEL1 Citizenship Sts 1
  City   WEST HOLLYWOOD                College Grade Lvl   4 Housing Status
  State  CA  Zip Code        90731     Dependency Status   I Default Status  N
  Home Telephone No   (310)548-5426    State Residency    CA SAP
                                       Award Method.    MET2 Prior Degree    N
Local Address                          Auto Zero EFC       Y Borrower Based  N
------------------------------         Simplified Needs    Y Pell Elig. Flag Y
  Street
  City                               Interested In          Verification
  State    Zip Code                  ---------------------- -----------------
  Local Telephone No                   Employment          N Code
                                       Student Loan        Y Pell Status     N

Needs Analysis
------------------------------
 Budget                     17750    Enrollment
  -EFC                          0    Term       Status
                          -------    ----------------
 =Unmet Need                17750      FALL   FALL 1999
 -Awarded Funds              7500      SPRING SPRING 2000
 -Unsub, Plus, NNB           1500
                          -------
 =Remaining Need             8750

 Overaward Indicator            N    Record Status
 Pell EFC                       0    -----------------------------------------
 Estimated Pell Award        3125      Pkg Results         A Packaging Status P
                                       Record Source       I External Export  Y
EFC Values                             Ready Date                   01/14/1999
------------------------------         Processed Date               02/12/1999
FISAP Total Income (FTI)        0      Received Date                01/27/1999
                                       Last Modified By   SYSADMIN  01/14/1999
```

```
Student SSN:    033646966                                              Page 2
                                                 Student ID:   033646966 AL 03
Name:           ALCEDO, JOSANA S     Current SSN:  033646966  Curr Pkg Status:   P

Awarded Funds
-------------------------------------------------------------------------------
INSTITUTE                                                CURRENT  PREVIOUS  ORIGINAL
FUNDS     A/D/O/S FALL   SPRING   N/A    N/A    N/A     TOTAL    TOTAL     TOTAL
-------------------------------------------------------------------------------
SCIENCE      A    1000    1000     0      0      0       2000       0       2000
SUBSDZED     A    2750    2750     0      0      0       5500       0       5500
UNSUB        A     750     750     0      0      0       1500       0       1500


-------------------------------------------------------------------------------
TOTAL             4500    4500     0      0      0       9000       0       9000


Last Award Letter Information
------------------------------ -------------
Award Letter #                   0
Award Letter Print Indicator     N
Award Letter Print Date
Award Letter Received?           N
Award Letter Received Date


Budget:        GRADUATE        02
--------- ---------------------------------------------------------------------
Tuition and Fees       10500                                     0
Room and Board          4000                                     0
Books and Supplies       950                                     0
Transportation Costs    1500                                     0
Miscellaneous            800                                     0
                                   Total                     17750

User-Defined Formulas
-------------------------------------------------------------------------------
   Formula                                                          Result
-------------------------------------------------------------------------------
```

```
Student SSN:    034402939                                                   Page 3
                                                  Student ID:   034402939 AL 10
Name:            ALLEN, RAYMOND      Current SSN:  034402939  Curr Pkg Status:   P

Permanent Address                        Student Status Information
---------------------------------------  ------------------------------------------
   Street  24407 NARBONNE AVENUE            A/Y Profile      PEL1 Citizenship Sts 1
   City    SAN PEDRO                        College Grade Lvl   1 Housing Status
   State   CA  Zip Code        90006        Dependency Status   D Default Status  N
   Home Telephone No   (213)385-5751        State Residency    CA SAP
                                            Award Method.    MET1 Prior Degree    N
Local Address                               Auto Zero EFC       N Borrower Based  N
------------------------------              Simplified Needs    Y Pell Elig. Flag Y
   Street
   City                                  Interested In          Verification
   State    Zip Code                     ---------------------- ------------------
   Local Telephone No                       Employment          Y Code           21
                                            Student Loan        Y Pell Status     S

Needs Analysis
------------------------------
   Budget                     10850      Enrollment
    -EFC                          0      Term       Status
                            -------      -----------------
   =Unmet Need                10850         FALL   FALL 1999
   -Awarded Funds              9625         SPRING SPRING 2000
   -Unsub, Plus, NNB           1225
                            -------
   =Remaining Need            10850

   Overaward Indicator            N      Record Status
   Pell EFC                       0      ------------------------------------------
   Estimated Pell Award        3125         Pkg Results         O Packaging Status P
                                            Record Source       I External Export  Y
EFC Values                                  Ready Date                   01/14/1999
------------------------------              Processed Date               04/08/1999
FISAP Total Income (FTI)          0         Received Date                02/03/1999
                                            Last Modified By    SYSADMIN 01/14/1999
```

Student SSN: 034402939

Student ID: 034402939 AL 10

Name: ALLEN, RAYMOND Current SSN: 034402939 Curr Pkg Status: P

Awarded Funds

INSTITUTE FUNDS	A/D/O/S	FALL	SPRING	N/A	N/A	N/A	CURRENT TOTAL	PREVIOUS TOTAL	ORIGINAL TOTAL
CHAMBER	O	1000	1000	0	0	0	2000	0	0
PLUS	O	613	612	0	0	0	1225	0	1225
SUBSDZED	O	1313	1312	0	0	0	2625	0	2625
WORK	O	2500	2500	0	0	0	5000	0	5000
TOTAL		5426	5424	0	0	0	10850	0	8850

Last Award Letter Information

Award Letter #	1
Award Letter Print Indicator	Y
Award Letter Print Date	01/14/1999
Award Letter Received?	Y
Award Letter Received Date	

Budget: STANDARD 03

Tuition and Fees	7000	0
Room and Board	1500	0
Books and Supplies	800	0
Transportation Costs	750	0
Miscellaneous	800	0
	Total	10850

User-Defined Formulas

Formula	Result

```
Student SSN:    010608948                                                      Page 5
                                                          Student ID:    010608948 AY 01
Name:              AYALA, NASRIN I     Current SSN:  010608948  Curr Pkg Status:    P

Permanent Address                      Student Status Information
-------------------------------------  ---------------------------------------
  Street  4716 WEST 153RD PLACE. #115    A/Y Profile       PEL1 Citizenship Sts 1
  City   LOS-ANGELES                     College Grade Lvl  1 Housing Status
  State  CA  Zip Code       90016        Dependency Status  I Default Status  N
  Home Telephone No   (243)837-8765      State Residency   CA SAP
                                         Award Method.    MET2 Prior Degree     N
Local Address                            Auto Zero EFC      N Borrower Based  N
------------------------------           Simplified Needs   N Pell Elig. Flag Y
  Street
  City                                 Interested In          Verification
  State    Zip Code                    ---------------------- -----------------
  Local Telephone No                     Employment         N Code
                                         Student Loan       Y Pell Status     N

Needs Analysis
------------------------------
  Budget                    17750      Enrollment
   -EFC                     10388      Term       Status
                          -------      -----------------
  =Unmet Need                7362        FALL    FALL 1999
  -Awarded Funds             4625        SPRING SPRING 2000
  -Unsub, Plus, NNB          4000
                          -------
  =Remaining Need           -1263

  Overaward Indicator           N      Record Status
  Pell EFC                  10388      ---------------------------------------
  Estimated Pell Award          0        Pkg Results        A Packaging Status P
                                         Record Source      I External Export  Y
EFC Values                               Ready Date                 01/14/1999
------------------------------           Processed Date             05/15/1999
FISAP Total Income (FTI)        0        Received Date              03/04/1999
                                         Last Modified By   SYSADMIN 01/14/1999
```

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Report Date: 01/14/1999   U.S. DEPARTMENT OF EDUCATION                  PAGE:  1
Report Time:   14:14:37       EDEXPRESS - 1999-2000
                             LIST - FUND MAINTENANCE
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
****************************************************************************
                   AID    BEGINNING        ADJ TO          FUNDS         CURRENT
FUND DESCRIPTION   TYPE    BALANCE         BEG BAL        AWARDED        BALANCE
----------------   ----  ------------  ------------  ------------  ------------
CHAMBER OF COMMER   O    $     60,000 $           0 $       2,000 $      58,000
FEDERAL PLUS        P    $ 99,999,999 $           0 $      76,711 $  99,923,288
FEDERAL WORK STUD   W    $    400,000 $           0 $     129,000 $     271,000
FSEOG               E    $    275,000 $           0 $           0 $     275,000
SCIENCE SCHOLARSH   G    $    115,000 $           0 $      44,000 $      71,000
SUBSIDIZED          S    $ 99,999,999 $           0 $     118,490 $  99,881,509
UNSUBSIDIZED        U    $ 99,999,999 $           0 $      24,500 $  99,975,499

TOTAL FUNDS:                       7
TOTAL FUNDS AWARDED:         $394701
```

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Report Date: 01/14/1999   U.S. DEPARTMENT OF EDUCATION                PAGE:  1
Report Time:    14:15:33        EDEXPRESS - 1999-2000
                              MEASUREMENT TOOLS - FUNDS
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*******************************************************************************

Total Amount of Outside Resources Awarded:                                2,000
Total Amount of Other Grants Awarded:                                    44,000
Total Amount of Federal Pell Grants Awarded:                                  0
Total Amount of SEOG Awarded:                                                 0
Total Amount of Federal Perkins Loan Awarded:                                 0
Total Amount of Federal Work-Study Awarded:                             129,000
Total Amount of Need Based Loans Awarded:                                     0
Total Amount of Non-need Based Loans Awarded:                                 0
Total Amount of PLUS Awarded:                                            76,711
Total Amount of Federal Subsidized Stafford Loans Awarded:              118,490
Total Amount of Federal Unsubsidized Stafford Loans Awarded:             24,500

Total Number of Students Receiving Outside Resources:                         1
Total Number of Students Receiving Other Grants:                              22
Total Number of Students Receiving Federal Pell Grant:                        0
Total Number of Students Receiving SEOG:                                      0
Total Number of Students Receiving Federal Perkins Loan:                      0
Total Number of Students Receiving Federal Work Study:                       27
Total Number of Students Receiving Need Based Loans:                          0
Total Number of Students Receiving Non-need Based Loans:                      0
Total Number of Students Receiving Federal PLUS:                             20
Total Number of Students Receiving Federal Subsidized Stafford Loan:         40
Total Number of Students Receiving Unsubsidized Stafford Loan:                7
Total Number of Financial Aid applicants at this Institution:                49
Total Number of Students Receiving Financial Aid at this Institution:        43

Percentage of Students Receiving Outside Resources:                       2.33%
Percentage of Students Receiving Other Grants:                           51.16%
Percentage of Students Receiving Federal Pell Grant:                      0.00%
Percentage of Students Receiving SEOG:                                    0.00%
Percentage of Students Receiving Federal Perkins Loan:                    0.00%
Percentage of Students Receiving Federal Work Study:                     62.79%
Percentage of Students Receiving Need Based Loans:                        0.00%
Percentage of Students Receiving Non-Need Based Loans:                    0.00%
Percentage of Students Receiving Federal PLUS:                           46.51%
Percentage of Students Receiving Federal Subsidized Stafford Loan:       93.02%
Percentage of Students Receiving Federal Unsubsidized Stafford Loan:     16.28%
```

DOCUMENT TRACKING LETTER
1999-2000 AWARD YEAR

Date 01/14/1999

Institution Number G32673
THE GRADUATE SCHOOL OF AMERICA
330 2ND AVE SOUTH SUITE 550
MINNEAPOLIS, MN 55401

ALLA R. CANTY
1229 S KENMORE AVE
LOS ANGELES, CA 90710

Student ID 013586237 CA 10

Dear Student,

Dear Student,

Please make sure this works for you.

Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

Missing	1999-2000 Promissory note
Missing	1999-2000 Entrance interview form

Sincerely,
Financial Aid Administrator

FINANCIAL AID AWARD OFFER
1999-2000 AWARD YEAR

Date 01/14/1999

RETURN THIS FORM BY: 01/13/1999 TO:

Institution Number G32673
THE GRADUATE SCHOOL OF AMERICA
330 2ND AVE SOUTH   SUITE 550
MINNEAPOLIS MN 55401

ANGELA L. MCCLAIN
9330 GLASGOW PL #7
LOS ANGLES CA 90029

Student ID: 013426455 MC 06 01

Dear Student,
Based on the information you provided, the Financial Aid Office is pleased to offer you this financial aid award to help you finance your education.

BUDGET		EFC		UNMET NEED		AWARDED FUNDS		REMAINING NEED
$10,850	-	551	=	$10,299	-	$10,850	=	$-551

TYPE OF AID	Decline?	FALL	SPRING	TOTAL
*************************	********	*******	*******	*******
FEDERAL PLUS	[]	$ 1613	$ 1612	$ 3225
SUBSIDIZED	[]	$ 1313	$ 1312	$ 2625
FEDERAL WORK STUDY	[]	$ 2500	$ 2500	$ 5000

TOTAL AWARDED FUNDS	$10850

Please sign below and return this agreement by the date at the top of this letter if you wish to accept this award. If you wish to decline an award, simply indicate by checking the box next to the award. Your signature on this document certifies you have carefully read and understand the information contained within. If you decide not to attend, your written notification to us voids this award.

SIGNATURE ________________________________   DATE ________________

ANGELA L. MCCLAIN
Student ID 013426455 MC 061

Dear Student,

Please make sure this works for you.

Please note, this offer is an estimate until we have received the following document(s) from you to complete your financial aid file. The following document(s) is/are missing and/or incomplete.

Missing	1999-2000	Entrance interview form
Missing	1999-2000	Parent's tax form
Missing	1999-2000	Promissory note

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SIGNATURE ______________________________ DATE ______________

FINANCIAL AID AWARD OFFER
1999-2000 AWARD YEAR

Date 01/14/1999

RETURN THIS FORM BY: 01/13/1999 TO:

Institution Number G32673
THE GRADUATE SCHOOL OF AMERICA
330 2ND AVE SOUTH   SUITE 550
MINNEAPOLIS MN 55401

ANGELA L. MCCLAIN
9330 GLASGOW PL #7
LOS ANGLES CA 90029

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SIGNATURE ______________________________ DATE ________________

Date 01/14/1999

Institution Number G32673
THE GRADUATE SCHOOL OF AMERICA
330 2ND AVE SOUTH   SUITE 550
MINNEAPOLIS, MN 55401

CONSUELO J. PENA
7260 HILLSIDE AVE #201
LOS ANGELES, CA 90029

Student ID 006963951 PE 01

You owe us an entrance interview form.

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Report Date: 01/14/1999   U.S. DEPARTMENT OF EDUCATION                  PAGE:  1
Report Time:    14:19:35       EDEXPRESS - 1999-2000
                                   Record Layout
                          Record Layout - Import External Add
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Field   Field                                        Start        End
No.     Length          Field Description            Position     Position
-----   ------          -----------------------      --------     --------
    1        9          SSN                                 1            9
    2        2          Name ID                            10           11
    3        2          Transaction Number                 12           13
    4        9          Current SSN                        14           22
    5       16          Last Name                          23           38
    6        9          First Name                         39           47
    7        1          Middle Initial                     48           48
    8       28          Permanent Address                  49           76
    9       16          Permanent Address City             77           92
   10        2          Permanent Address State            93           94
   11        9          Permanent Zip Code                 95          103
   12       10          Phone Number                      104          113
   13       28          Local Address                     114          141
   14       16          Local Address City                142          157
   15        2          Local Address State               158          159
   16        9          Local Zip Code                    160          168
   17       10          Local Phone Number                169          178
   18        1          College Grade Level               179          179
   19        4          Academic Yr Profile Code          180          183
   20        1          Dependency Status                 184          184
   21        4          Budget Code                       185          188
   22        5          EFC                               189          193
   23        1          Pell Verification Status          194          194
   24        2          Verification Code                 195          196
   25        8          Total Income                      197          204
   26        1          Enrollment Status Term 1          205          205
   27        1          Enrollment Status Term 2          206          206
   28        1          Enrollment Status Term 3          207          207
   29        1          Enrollment Status Term 4          208          208
   30        1          Enrollment Status Term 5          209          209
   31        1          Housing Status                    210          210
   32        2          SAP Indicator                     211          212
   33        1          Default Status Indicator          213          213
   34        1          Interest In Work-Study            214          214
   35        1          Interest In Student Loan          215          215
   36        2          State Residency                   216          217
   37        1          Borrower Based Indicator          218          218
   38        8          Trans. Processed Date             219          226
   39        1          Simplified Needs                  227          227
   40        1          Overaward Indicator               228          228
   41        5          Pell EFC                          229          233
   42        1          Auto Zero EFC Flag                234          234
   43        1          Update Demo Record Flag           235          235
   44        1          Prior Degree?                     236          236
   45        1          Pell Eligibility Flag             237          237
   46        8          Application Received Date         238          245
  ***** Record Length = 245
```